

SYDNEY FOOTBALL STADIUM REDEVELOPMENT

STATE SIGNIFICANT DEVELOPMENT APPLICATION

Concept Proposal and Stage 1 Demolition

SSDA 9249

APPENDIX O:

Social and Economic Impact Statement

ETHOS URBAN

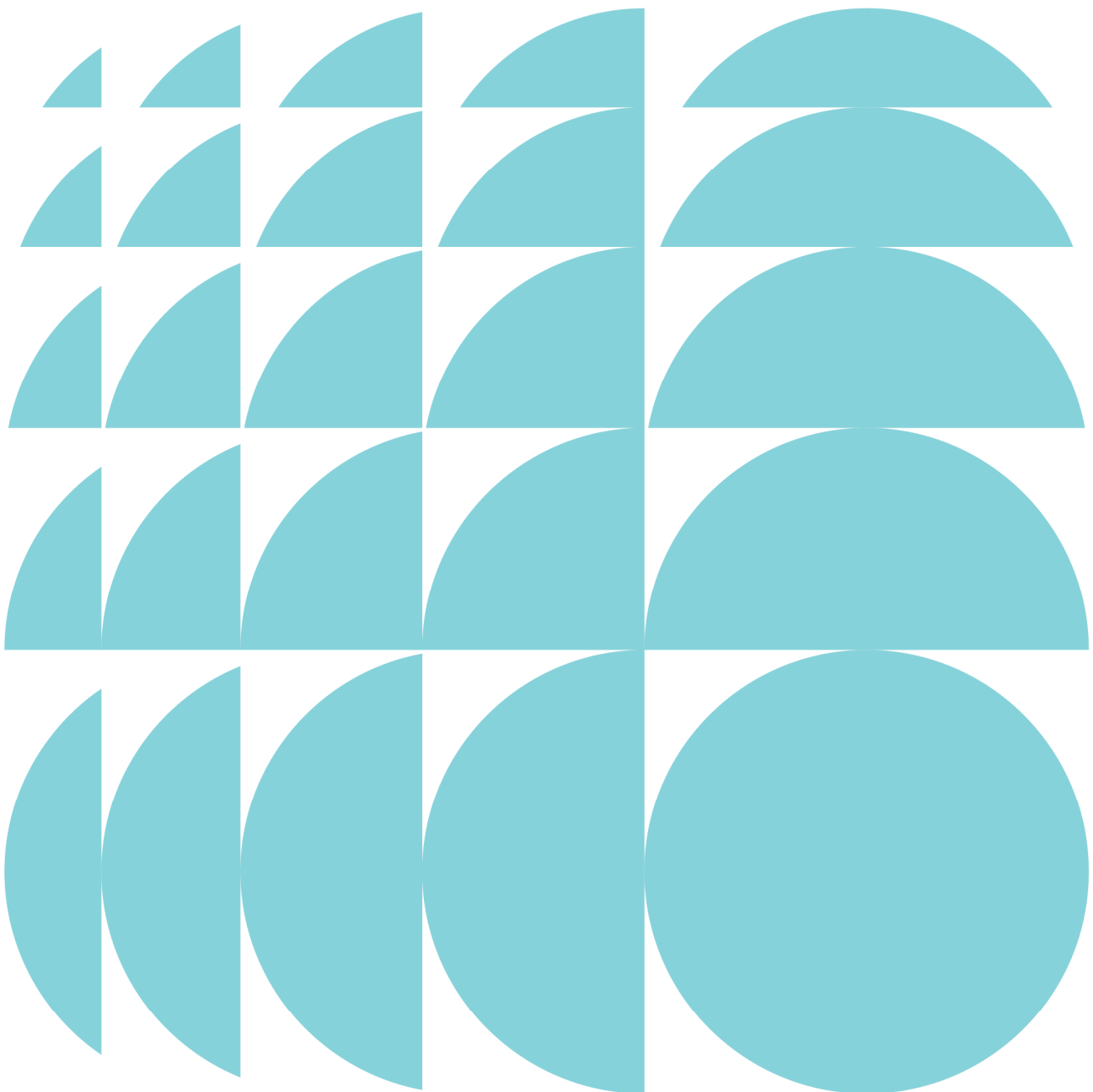
Social and Economic Impact Assessment - Stage 1 DA

Sydney Football Stadium, Moore Park

Submitted to Department of Planning &
Environment

On behalf of Infrastructure NSW

June 2018 | 218261



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JASON ANDERSON June 2018

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Executive Summary

In November 2017 the NSW Government announced its intention to redevelop the Sydney Football Stadium with a new stadium built to modern standards. Infrastructure NSW is seeking approval for demolition of the existing stadium and the construction of a new 45,000 seat stadium on the existing site, wholly within lands owned by the Sydney Cricket and Sports Ground Trust.

Assessment and approval of the project will be undertaken in two stages under Section 83B of the *Environmental Planning and Assessment Act 1979* (EP&A Act). Stage 1 of the Project includes an initial application for the Concept Proposal and demolition and construction works (the Proposal) to accommodate the new Stadium and is the subject of this Social and Economic Impact Assessment.

This Social and Economic Impact Assessment (SEIA) reviews and assesses the potential social and economic impacts of the Proposal in accordance with the Secretary's Environmental Assessment Requirements (SEARs) issued for the Project. This SEIA has been prepared to support the Environmental Impact Statement (EIS) for Stage 1 of the Project.

The functionality of the proposed new stadium, scoped by Infrastructure NSW in consultation with the Sydney Cricket and Sports Ground Trust for the purposes of the Business Case, envisages a revitalised stadium precinct featuring:

- larger entrance plazas, making it easier to enter and leave the venue
- improved movement routes within and around the stadium, including improved accessibility
- seating with high quality sightlines and improved proximity to the field of play
- wide concourses that are weather-protected and equipped with a range of food and beverage outlets
- contemporary digital technology
- a roof that provides 100 per cent drip line coverage
- improved premium hospitality and member facilities
- enhanced capacity to cater for back-to-back events/multiple matches that enables further growth of women's sport and increased female participation in all aspects of professional sport.

The recent Business Case identified that the Sydney Football Stadium currently has limited ability to meet modern day safety, security and amenity standards. It therefore struggles to deliver the premium stadia entertainment experience that the public are seeking from large scale sporting and cultural events.

The key operational challenges and constraints identified in the *Sydney Football Stadium – Final Business Case* (March 2018) include inadequacy in terms of access for people with a disability; safety and security of patrons; operational inefficiencies including toilet, food and beverage and back of house facilities; viewing quality for spectators; and weather protection.

In particular, the roof of the stadium provides the lowest level of weather protection of any Tier 1 stadium in Australia, while our analysis points to the lower amenity of uncovered seating as a major constraint on attendance.

The proposal for a new Sydney Football Stadium, built to modern standards, is expected to provide a range of social and economic benefits to the community at a local, metropolitan and state level. These include:

- Up to 15% increase of patrons a year spread over an increased number and range of events, as well as expected improvements in reliability of patronage and average attendance;
- Greater equity of access for a wider range of socio-economic groups across Sydney as a result of improved weather protection and sight lines to the full range of seating available;
- Dripline coverage of all seated areas, representing a significant improvement in weather protection that is expected to support growth in both numbers and reliability of patronage at major events;
- Significantly improved customer facilities and associated visitor experience in and around the new stadium precinct;
- Improved accessibility to, through and within the Stadium including significant enhancements to access for disabled people in line with modern design standards;
- Alignment with and efficient leverage of existing transport infrastructure investment in the form of the CBD and South East Light Rail and the Albert 'Tibby' Cotter Bridge;

- Improved competitiveness, at State, national and international level, to host major sporting and non-sporting events that are an important offer for NSW's tourism industry, which is worth \$33.2 billion per year to the NSW economy and supports 160,000 jobs;
- Demand for additional hotel room nights per year and support for additional full time jobs in hotel and accommodation services;
- Creation of up to 600 FTE new jobs during construction and 300 FTE jobs within the new completed Stadium;
- Increased spending of up to \$6 million in hospitality, accommodation and entertainment within the immediate local area as a result of increased reliability and total levels of patronage;
- Consequent increases in local employment in these industries, expected to be up to an additional 180,000 hours per year or an equivalent of 346 part-time jobs;
- Enhanced connectivity and accessibility through and around the precinct for pedestrians and cyclists;
- Improved safety, natural surveillance and lighting throughout the stadium and precinct.

The Proposal also has the potential to result in some adverse socio-economic impacts, most of which are short term and occur during construction. These include:

- Amenity impacts in terms of noise, vibration, construction traffic and visual amenity during construction;
- Temporary occupation of SCG Members' and precinct car parking for use as the construction compound;
- Inconvenience for Members and fans of SFS home teams that are required to temporarily relocate to other venues during construction; albeit that many events will be transferred to the adjacent SCG;
- Temporary changes to or restriction of access through and around the site during construction;
- Risk of impact on items of heritage value during excavation, in particular Busby's Bore;
- Ecological and environmental impacts include the unavoidable loss of small numbers of trees.

This SEIA recommends a range of mitigation measures to manage these socio-economic impacts in accordance with other technical assessments undertaken as part of the EIS and in line with relevant legislation, policy and guidelines.

1.0 Introduction

This Social and Economic Impact Assessment (SEIA) has been prepared in response to the Secretary's Environmental Assessment Requirements (SEARs) issued on 3rd May 2018. This introductory section of the Assessment describes the background; purpose and scope in response to the SEARs. Further detail specific to the Social Impact Assessment (SIA) and the Economic Impact Assessment (EIA) is documented within relevant sections of the SEIA following. In response to the SEARs, this report addresses the following social and economic impacts:

Assess the social and economic impacts of the development, including the benefits the stadium will generate for Sydney CBD and the local region, including tourism, retail, entertainment and night-time economies

1.1 Background

The Sydney Football Stadium (SFS) is a significant component of the sports facilities that comprise the Sydney Cricket and Sports Ground (SC&SG). Completed in 1988, the SFS has hosted numerous sporting events in its 30 years of operation for a number of sporting codes including football (soccer), rugby league and rugby union as well as occasional music concerts.

The NSW Stadia Strategy 2012 provides a vision for the future of stadia within NSW, prioritising investment to achieve the optimal mix of venues to meet community needs and to ensure a vibrant sports and event environment in NSW. A key action of the strategy included development of master plans for Tier 1 stadia and their precincts covering transport, integrated ticketing, spectator experience, facilities for players, media, corporate and restaurant and entertainment provision. SFS is one of three Tier 1 stadia within NSW, the others being Stadium Australia (Olympic Park) and the Sydney Cricket Ground. In order to qualify for Tier 1 status, a stadium is required to include:

- Seating capacity greater than 40,000;
- Regularly host international sporting events;
- Offer extensive corporate facilities, including suites, open-air corporate boxes and other function/dining facilities; and
- Be the home ground for sporting teams playing in national competitions.

Following release of the NSW Stadia Strategy, the Sydney Cricket and Sports Ground Trust (SCSGT) undertook an extensive master planning exercise culminating in the preparation of the 2015 Preliminary SCG Master Plan. This master plan defines the context for future redevelopment of the SCG, SFS and related sports infrastructure to ensure that the precinct continues to meet the needs and expectations of visitors and tenants into the future.

According to the *Sydney Football Stadium - Final Business Case (March 2018)*, the existing Allianz Stadium (SFS) is now facing commercial and operational challenges in remaining relevant and competitive at a national level for existing and future hirers and patrons. Due to its age the stadium has a number of operational deficiencies that detract from its ability to function as a modern and competitive Tier 1 stadium. Key deficiencies include patron experience, crowd management, safety/security, accessibility, facilities for core tenants, operational efficiency, premium hospitality and food/beverage offerings and media requirements.

On 24 November 2017, the NSW Premier announced the SFS Redevelopment. The redevelopment will include demolition of the existing facility and replacement with a modern, globally competitive stadium that satisfies the criteria to be a Tier 1 stadium to meet future requirements. According to the Final Business Case prepared for the proposal, redevelopment of the SFS will assist in realising the Master Plan vision and principles to:

- Create a flexible venue suitable for sports, e-sports and major events alike;
- Include technology for the future;
- Create a venue for the growth of men's and women's elite sport, as well as the ability to adapt to new sports and the rise of e-sports;
- Create a publicly accessible entertainment and recreational facility;
- Create a stadium integrated with its surrounds including Centennial and Moore Parks and the surrounding residential and business areas; and
- Create a sustainable future.

1.2 Purpose and scope of this Social and Economic Impact Assessment

1.2.1 Purpose

This Social and Economic Impact Assessment aims to provide an understanding of the social, community and economic context within which the proposed SFS Redevelopment will be undertaken. It identifies, defines and assesses the potential social and economic impacts (positive and negative) of the Sydney Football Stadium Redevelopment project in order to provide both a social and economic perspective that can inform the Environmental Impact Assessment (EIA) process.

This SEIA also recommends measures to effectively manage and mitigate future potential impacts. It should be read in conjunction with the Environmental Impact Statement and other technical documentation prepared in response to the Secretary's Environmental Assessment Requirements (SEARs).

1.2.2 Scope

This SEIA documents our assessment of the social and economic impacts of the proposal, comprising an assessment of the impacts of the project during the demolition and construction of the proposed stadium, and it extends into considerations of the impacts once operational. This scope is set by the SEARs as listed in the section below.

This assessment is based on a desktop review of publicly available information and has been undertaken with guidance and reference to relevant consultant reports that responds to other specific items of the project SEARs. It considers both qualitative and quantitative indicators associated with the project and consolidates these as a means to measure and understand the potential for both positive and negative impacts of the project. Impacts that have been considered can be broadly grouped in the following socio-economic categories:

- Impacts arising from temporary acquisition and occupation of the property to facilitate the proposed redevelopment (i.e. impacts as a result of the demolition and construction);
- Impacts on local amenity, including traffic and transport, noise and vibration, air quality, visual amenity, crime and public safety;
- Impacts on the local movement network in terms of public transport, private vehicles, cyclists and pedestrians;
- Impacts arising on the social and cultural contributions of an operational new stadium for the local area and Greater Sydney; and
- Impacts on the local, regional and State economy with reference to specific business and sectors.

1.3 Secretary's Requirements

This SEIA has been prepared in response to the SEARs issued on 3rd May 2018. The key social and economic impact matters raised by the Secretary for consideration in the SEIA are:

Social and Economic Impacts

Assess the social and economic impacts of the development, including the benefits the stadium will generate for Sydney CBD and the local region, including tourism, retail, entertainment and night-time economies.

1.4 Structure of this Social and Economic Impact Assessment Report

The structure of the SEIA Report is as follows:

- **Section 1:** Introduction – outlines the purpose and structure of this Social and Economic Impact Assessment.
- **Section 2:** Existing Development and Current Operations – provides an overview of the current Sydney Football Stadium and its operations.
- **Section 3:** Proposed Development and Future Operations – provides an overview of the proposed development and the intended future operations against which potential future social and economic impacts are assessed.

- **Section 4:** Project Context – provide an overview of the site and its surrounding context in terms of its environment, demographics, local infrastructure and accessibility as well as a summary of the strategic policy context for the precinct.
- **Section 5:** Social Impact Assessment Methodology – describes the statutory context, relevant guidelines and methodology used for carrying out the social impact assessment.
- **Section 6:** Social Impact Assessment – documents and assesses the potential social impacts associated with the proposed development.
- **Section 7:** Economic Impact Assessment Methodology - describes the statutory context, relevant guidelines and methodology used for carrying out the economic impact assessment.
- **Section 8:** Economic Impact Assessment – documents and assesses the potential economic impacts associated with the proposed development.
- **Appendices**

2.0 Existing Development and Current Operations

The following section provides an overview of the Sydney Football Stadium and its current operations and highlights the current challenges and constraints that hinder the stadium's ability to provide a Tier 1 experience in the current nationally competitive stadium environment for sporting and entertainment.

2.1 Current Stadium profile & operations

2.1.1 Existing Sydney Football Stadium

The Sydney Football Stadium (SFS), otherwise known as the Allianz Stadium, was originally opened in 1988. Developed by the Sydney Cricket and Sports Ground Trust, at the time of its opening the SFS was one of Australia's leading sporting venues, providing a state-of-the-art facility for sports requiring a rectangular field such as rugby league, rugby union and football (soccer).

The stadium was designed by Philip Cox Richardson Taylor and Partners Pty Ltd and is characterised by its 'saddle' structure, whereby the roofline is curved to stretch over the 3-5 storey box stands and down to the lower-level terraces. The openings in the roof line are oriented to the north and south and reduce the height of the stadium in these corners to approximately 3 storeys. The venue underwent renovations in 2006.

The SFS has hosted Australia's international teams such as the Kangaroos, the Wallabies and the Socceroos, with the longer term and more permanent tenants being the Sydney Roosters (since 1988), South Sydney Rabbitohs (since 2015), the NSW Waratahs (since 1996) and Sydney FC (since 2005). The stadium also regularly hosts other sporting events such as the International Rugby 7's tournament and live music concerts.

The key features of the existing stadium are as follows:

- The stadium has the capacity for 45,000 patrons, with around 44,000 seated, surrounding a rectangular field. Spectators are divided into the members area comprising the upper level western stand, and areas for ticket holders comprising the eastern stand and all of the terraces. 28 seats are available for persons in wheelchairs.
- The stadium has been designed with a wave-like roof structure that shields approximately 55% of the available seating from the 'drip line', which means the lower bowl is uncovered and the back of the tiers are exposed through openings in the roof line. This makes it the lowest level of weather protection of any Tier 1 stadium in Australia.
- Access to the stadium and surrounds are controlled by fences, with entry/exit to the site available from two locations; off Driver Avenue and Moore Park Road. The Moore Park Road entry is only accessible via stairs, to accommodate for the 12m change in level between the road and stadium that was created when the seating bowl was sunk into the ground to reduce bulk and scale. Entry to the stadium is closed off and limited to authorised personnel outside of events.
- Circulation within the stadium was designed in line with historic building codes and is not adequate to service maximum patron numbers.
- Corporate facilities are available in the form of private suites which are undercover balcony seating areas with private dining and beverage options, and open boxes which comprise two rows of seats with a mini bar fridge. The stadium does not provide for broadcast capabilities areas for pre and post-match entertainment spaces.
- There are only 2 changerooms designed for male players
- Only 48 women's bathrooms available on site.
- Servicing is accommodated in back of house areas and a single goods lift, with no basement area provided for the stadium. The movement of goods, staff and waste around the venue routinely leads to a cross-over between operations and patrons in the front of house areas.
- Large scale LED screens are located at the northern and southern ends of the stadium.

The key features of the stadium are reflective of the time in which it was designed and constructed. It was conceived when sport was largely amateur in Australia and there was no Super Rugby, A-League and women's competitions or special events like the Sydney Sevens and US College Football. This former period in both sport and architectural design have influenced the design and operation of SFS, which does not hold up to contemporary

standards in accessibility, women's sports and facilities, corporate facilities, modern media requirements, access or evacuation. An aerial photograph of the stadium is provided below at **Figure 1**.



Figure 1 – Aerial of Sydney Football Stadium

Source: Sydney FC

2.2 Stadium Tenants / Users

2.2.1 National Rugby League

Sydney Roosters

The Sydney Roosters was originally founded in 1908 in Paddington, as the Eastern Suburbs District Rugby League Football Club. In 1995 the club's brand name was changed to the Sydney City Roosters and, in 2000, to simply the Sydney Roosters.



The Sydney Roosters compete in the National Rugby League (NRL) and is one of the oldest clubs in Australian rugby league history, having won thirteen New South Wales Rugby League (NSWRL) and National Rugby League titles, and several other competitions. The club holds the record for having the most wins and the second greatest margin of victory in a match in Australian rugby league history. The Sydney Roosters traditional fan base is in Sydney, and particularly eastern Sydney. The Roosters have a high membership base, with 15,686 memberships sold for the 2017 season.

South Sydney Rabbitohs

The South Sydney Rabbitohs was originally founded in 1908, forming part of the NSWRL competition and representing the municipalities of Redfern, Alexandria, Zetland, Waterloo, Mascot and Botany. Along with the Sydney Roosters they are the only remaining foundation member of the NSWRL competition that began in 1908.

Only a few home games are currently played at the SFS, with the majority located at Stadium Australia. There were just two games played in 2017 and none in 2018.



The club is based in Redfern, where the club's administration and training facilities are located, however they have long held a wide supporter base spread all over New South Wales. The South Sydney Rabbitohs have won 21 first grade premierships, making them the most successful rugby league side in Australian history. In addition to winning the most premierships, the Rabbitohs also hold the distinction of being the only club to win a premiership in their inaugural season.

The South Sydney Rabbitohs continue to have a large supporter base in their traditional areas of South-eastern Sydney, and also enjoy a significant following from around the country. In 2015 the Rabbitohs had the highest football club membership in the National Rugby League, with membership exceeding 35,000, including more than 11,000 ticketed members, the highest of the Sydney-based NRL clubs.

2.2.2 National Football League (A-League)

Sydney Football Club

The Sydney Football Club, commonly known as Sydney FC, is an Australian professional soccer club that competes in Australia's premier football league, the A-League. Since commencement of the A-League in 2005, Sydney FC has three championships (in 2006, 2010 and 2017), three Premierships (2009–10, 2016–17 and 2017–18), one FFA Cup (2017). Sydney FC have also participated in the group stage of the AFC Champions League four times, previously; in 2007, 2011, 2016 and 2018 and are due to once again compete in the Asian Champions League in 2019.



Sydney FC also have teams that compete in the W-League and in the National Youth League. The club is widely supported across Sydney, having been the only Sydney club competing in the A-League up until 2012. They are therefore one of the most heavily supported clubs in Australia and have a solid membership base with some 14,800 members during the most recent 2017/18 season.

2.2.3 Australian Rugby Union (Super Rugby)

New South Wales Waratahs

The NSW Waratahs, commonly referred to as 'the Waratahs', are an Australian Rugby Union team that represents the state of NSW in the Super Rugby competition. The team, as it is currently known, commenced in professional rugby as part of the inaugural Super 12 competition in 1996, however the club's origins date back over 130 years when the Southern Rugby Union competition commenced in the late 1800's. The Waratahs have a large fan base given their representation of the most populist state in Australia, with reportedly 15,000 members in 2016.



2.2.4 Other Events – Concerts

In addition to sporting events, the SFS is also used for large scale concerts on regular occasions, with the likes of U2, Coldplay, Foo Fighters, Bon Jovi, Eminem and Taylor Swift having performed at the stadium in the past. On average the stadium presently hosts one concert tour event per year, with these concerts generally being the bigger name concerts that require large scale venues to accommodate significant attendance levels.

2.3 Business Case Recommendations

The Business Case has identified that the Sydney Football Stadium currently has numerous shortcomings that limit its ability to meet modern day safety, security and amenity standards. As a result, the stadium is considered to no longer provide the premium stadia entertainment experience that the public are seeking when they attend large scale sporting and cultural events. Furthermore the existing stadium has limitations in its ability to remain competitive in the Australian market. According to the *Sydney Football Stadium – Final Business Case* (March 2018), some of the key identified operational challenges and constraints are:

- **BCA and disabled access compliance** – The environment in which the stadium operates has changed markedly over the past 30 years. Both the Building Code of Australia and the Disability Discrimination Act have been introduced since the stadium opened in 1988, accordingly the stadium does not provide adequate access for people with a disability and no longer meets relevant building standards and requirements.
- **Safety and Security** – The security context in which large scale public assembly venues operate within is now vastly different to that from that of 30 years ago. Stadiums have evolved and improved in response to the emergence of terrorism as a viable public threat. SFS in its current form is lacking in its security features, potentially increasing the risk profile and impact of a terrorism event.
- **Operational inefficiencies** – The venue's physical configuration leads to operational inefficiencies and additional costs due to the time required to prepare the stadium for events, and the need to allocate additional staff to ensure safety during events. The stadium's concourses are narrow and become unreasonably crowded as insufficient toilets and food outlets result in queueing. Back-of-house facilities are also inadequate. The inclusion of only a single goods lift as well as storage and dock areas that are undersized significantly hinder the operation of the stadium. The lack of a basement also results in routine cross-over between operations and patrons. Overall the lack of back-of-house infrastructure results in inefficient movement of goods, staff and waste around the venue.
- **The venue experience:** While the issues described above all have an adverse impact on the experience of patrons, the key shortcomings of the venue experience are the viewing quality and the lack of weather protection. Sightlines at the stadium vary and some view lines are obstructed. The roof of the stadium provides coverage of only 55 per cent to the "drip line" - the lowest level of weather protection of any Tier 1 stadium in Australia, while the lower bowl is entirely uncovered, and the upper levels are exposed to weather through openings at the back of the tiers.
- **The hirer experience:** The hirers of the venue also experience its limitations, for example the stadium has only two change rooms, both of which are small and poorly equipped. The coaches' boxes are inadequate and have an obstructed view of the field of play, which is a significant impediment for professional elite sports.

3.0 Proposed Development and Future Operations

This section provides an overview of the proposed development and its intended future operations.

3.1 The Proposed Sydney Football Stadium Redevelopment Project

According to the *Final Business Case (March 2018)* the Sydney Football Stadium Redevelopment project will involve demolition of the existing stadium and construction of a new stadium with a capacity of up to 45,000 seats. The new stadium will be located broadly on the site of the current stadium but will be a significantly improved facility aimed at ensuring the SFS re-establishes itself as a premier world class Tier 1 stadium. Key features will include:

Key features aimed at improving user/patron experience

- larger entrance plazas, making it easier for patrons to enter and exit the venue.
- improved movement routes within and around the stadium, including improved accessibility.
- seating with high quality sightlines and improved proximity to the field of play.
- wider public concourses around the stadium that are weather-protected and equipped with a range of food and beverage outlets.
- contemporary digital technology
- all weather seating with a roof that covers 100% of the seats.
- improved premium hospitality and member facilities.

Key features aimed at improving operations

- four fully equipped change rooms for teams enabling the stadium to cater for multiple matches events.
- State of the art facilities for coaches and match officials designed to meet international standards.
- Separate facilities provided to reflect increased female participation in all aspects of professional sport;
- An integrated basement with a 360-degree service road, allowing it to operate efficiently, including when hosting concerts that require the movement of large quantities of stage and production equipment.
- State-of-the-art recording, reporting and production facilities within the stadium.

3.2 State Significant Development Application

The proposed development that forms the current State Significant Development Application (SSDA), comprises Stage 1 of the overall Project, and seeks approval for the following:

- Stage 1 – Concept Proposal for the stadium envelope and supporting retail and functional uses as well as development consent for the carrying out of early works comprising demolition of the existing facility and associated structures.
- Stage 2 – detailed design, construction and operation of the stadium and supporting business, retail and functional uses.

Figure 2 and **Figure 3** indicate the nature of the proposed Sydney Football Stadium redevelopment concept that is consent is being sought for under the SSDA.

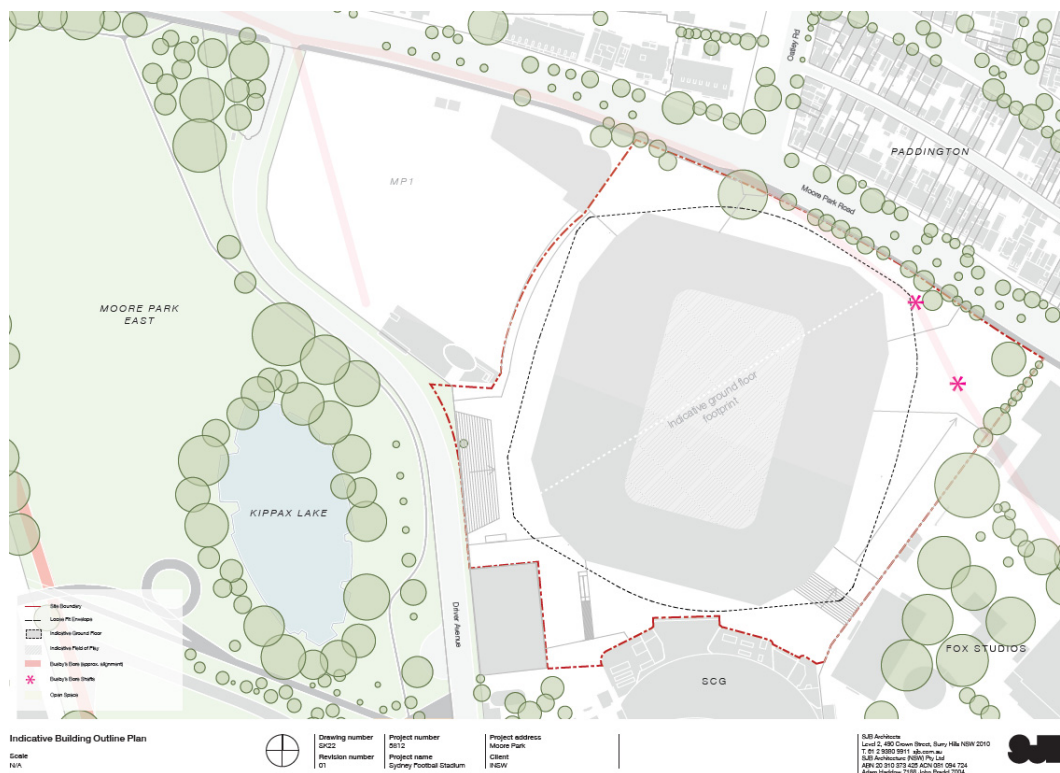


Figure 2 – Proposed Sydney Football Stadium Indicative Building Outline

Source – SJB Architects – Moore Park Stadium Urban Design Guidelines (May 2018)

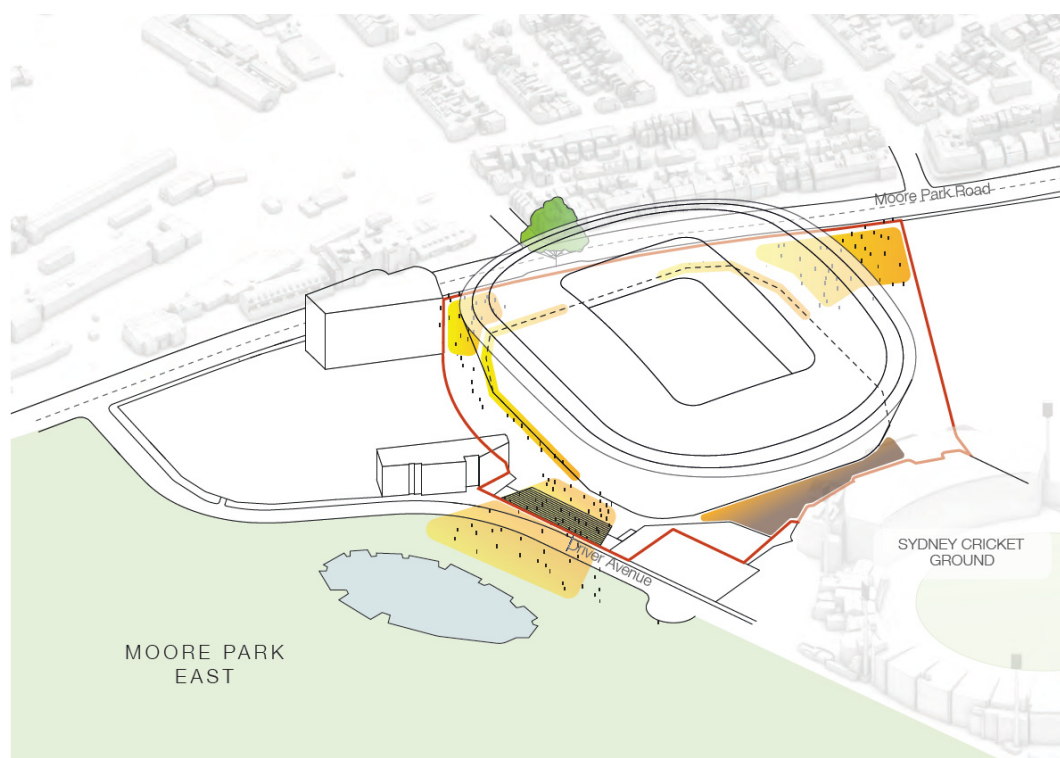


Figure 3 – Proposed Sydney Football Stadium Built Form Strategy

Source – SJB Architects – Moore Park Stadium Urban Design Guidelines (May 2018)

3.3 Proposed Sydney Football Stadium – Key Metrics and Features

The SSDA will establish the planning framework to allow for a future new Sydney Football Stadium that would have the following key metrics and features. Additional information regarding the stadium design is contained within the Urban Design Guidelines and will be detailed further in the Stage 2 SSDA.

Table 1 – Sydney Football Stadium Redevelopment – Key Metrics and Features

Item	Metric
Capacity of Stadium	<ul style="list-style-type: none"> Up to 45,000 inclusive of all corporate boxes and member stands. 55,000 for concert mode utilising the field of play.
Design Life	<ul style="list-style-type: none"> Up to 50 years
Roof Coverage	<ul style="list-style-type: none"> 100% spectators under the drip line
Stadium Design	<ul style="list-style-type: none"> Tier 1 international stadium Coliseum style seating bowl that is column free Include a stadium oculus that allows 360 degree circulation around the outside of stadium.
Bicycles	<ul style="list-style-type: none"> Bike racks and end of journey facilities to be provided for staff
Sustainability	<ul style="list-style-type: none"> LEED Gold
Food and Beverage	<ul style="list-style-type: none"> External facing bars and concession to the public plazas
Events/uses	<ul style="list-style-type: none"> Rugby Union Rugby League Football Concerts Major international events e.g. Commonwealth Games, FIFA. New sporting product supported via the: <ul style="list-style-type: none"> professionalisation of the women's game in football, rugby union and rugby league introduction of AFL X, AFL on rectangular pitch

4.0 Project Context

This section of the report provides an overview of the site and its surrounding context in terms of its environment, demographics, local infrastructure and accessibility. It also provides a high-level summary of the strategic policy context for the precinct.

4.1 Site Location and Context

The Sydney Football Stadium is located at 40-44 Driver Avenue, Moore Park within the City of Sydney Local Government Area (LGA). The site is located on the eastern edge of the city, approximately 3km from the Sydney CBD, and forms part of a larger entertainment and recreation Precinct shared with Centennial and Moore Parks, Fox Studios, and the Entertainment Quarter. It is located in the northern corner of the Precinct and is bound by Moore Park Road to the north, Paddington Lane to the east, the existing Sydney Cricket Ground stadium to the south and Driver Avenue to the west.

The site is connected to Sydney's transport network through existing bus routes and will benefit from a dedicated stop on the soon to be completed Sydney CBD and South East Light Rail.

The site's context is shown at Figure 4 and Figure 5 below.



Figure 4 – Location Plan

Source: Ethos Urban

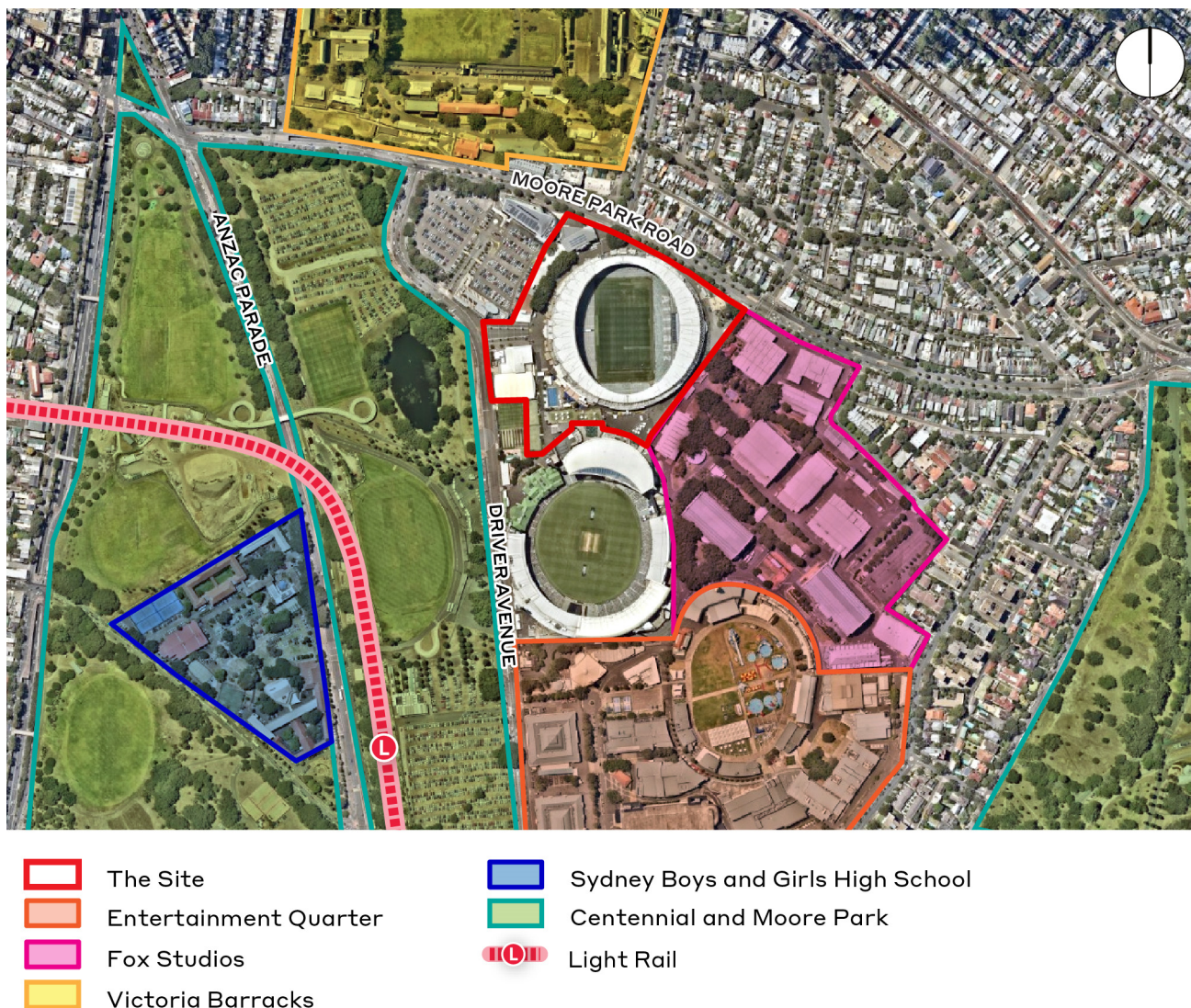


Figure 5 – Site context map

Source: Ethos Urban

4.1.1 Existing Development

The extent of existing development on the site is shown at **Figure 6**. Of these existing structures, the areas that will be subject to change as a result of this application comprise the following:

- the Sydney Football Stadium (also known as Allianz Stadium);
- the Sheridan Centre building;
- the Headquarters for Sydney Roosters and the Waratahs;
- the Cricket NSW Headquarters and indoor wickets; and
- the members car park (also known as Moore Park Carpark 1 or MP1).

The site also includes the Australian Rugby Development Centre (ARDC) and Rugby League Central buildings that are located respectively along the north and south of the MB1 carpark, however, these buildings will be retained and do not form part of the redevelopment site.



Items within the SCGT Boundary

1. MP1 Carpark
2. Rugby Australia
3. The Sheridan Centre
4. National Rugby League (NRL) Headquarters
5. Sydney Roosters
6. Allianz Stadium Forecourt
7. Stadium Store
8. Allianz Stadium
9. Moore Park Road Entrance
10. Paddington Lane
11. Wicket Cricket
12. Cricket NSW
13. The Stadium Club
14. Cricket NSW Outdoor Wickets
15. Tennis Courts/Flexible event spaces
16. Back of House servicing zone for Allianz Stadium
17. Tennis Courts
18. Sydney Cricket Ground Members Gate
19. Heritage Stand
20. Sydney Cricket Ground

Items outside the SCGT Boundary

1. Moore Park West
2. EP1/2 Car Park
3. Paddington Barracks
4. Tibby Cotter Walkway
5. Kippax Lake Field
6. Kippax Lake
7. Tramway Oval Field
8. Bus Loop and Bus Stops
9. Driver Avenue
10. Imperial Hotel
11. Entertainment Quarter (EQ)
12. Moore Park Showground Clock Tower

Figure 6 – Existing development and features of the site and adjoining Sydney Cricket Ground

Source: SJB

4.2 Surrounding development and land use

The site is located at an interface area between the larger entertainment and recreation Precinct shared with Centennial and Moore Parks, Fox Studios, and the Entertainment Quarter, and the eastern edge of the city that accommodates a mix of residential, commercial and educational uses. It is uniquely placed to respond to the parkland setting to the south and west, surrounding urban and lively mixed uses areas, and significant sporting and entertainment uses to the south and east.

Sydney Cricket Ground – to the South

The Sydney Cricket Ground (SCG) borders the site to the south and is a significant representation of Sydney's rich sporting history. The complex comprises a mix of stands, buildings, paved areas and landscaped spaces, recognising that this space has been continually used and changed since the first matches were played in the 1850's.

The stadium itself seats 48,000 spectators around an oval field that is used for cricket, AFL, rugby league and rugby union matches, recognising that this field was the major rugby venue prior to the opening of the SFS, as well as live music and entertainment. Recent works have occurred on site to upgrade the Noble and Bradman Stand and the Messenger Stand, which now includes ones of the largest video screens in Australia. These works increased the capacity of the stadium as well as various other improvements.

Outdoor spaces available onsite are predominantly utilised by members on event days and are unavailable to other ticket holders. The stadium offers no outward facing active uses, or soft landscaping to Driver Avenue, and is closed off from public access outside of events except for those with membership to the Stadium Club.

Entertainment Quarter – to the South

Further to the south and east of the Sydney Cricket Ground is the Entertainment Quarter. It incorporates a range of both contemporary and heritage buildings that are bordered by high brick walls, isolating the Quarter in areas from its surrounds. The Quarter includes a range of venues such as the Hordern Pavilion, Royal Hall of Industries, Show Ring and Comedy Store which are important spaces for hosting events in Sydney. The Entertainment Quarter also features one of the only permanent car parks in the area, being a multi-storey car park accessed off Errol Flynn Boulevard and Park Road with capacity for some 2,000 cars.

Fox Studios – to the East

Fox Studios borders SFS to the east and is separated from SFS by a brick wall that prevents any movement between the sites. Fox Studios have occupied the site since 1998 and feature a collection of buildings housing several sound stages, office space, and workshop/construction spaces that make up one of only three production and filming studios in Australia (the others being located in Melbourne). The Studios are integrated with the Entertainment Quarter and are managed by the Centennial and Moore Park Trust.

Paddington – to the North

To the north of the site is the suburb of Paddington. This suburb comprises largely residential uses with commercial, food and beverage venues concentrated around Oxford Street and Moore Park Road. Development is characterised by predominantly medium density terraces that feature dual frontages to the street and laneways, and which contribute to an overall fine-grain built form and street structure. The area is also characterised by landscaped streets and a significant topography that rises towards the stadium, creating local views of the stadium roofline.

Within this area, to the north west of the site between Oxford Street and Moore Park Road, is Victoria Barracks. It comprises a series of sandstone colonial era buildings surrounded by open space and bordered by sandstone walls. The Barracks do not present active frontages or provide pedestrian connections, being an active military base, which effectively creates a barrier to pedestrian and retail access from Oxford Street down to Moore Park and the stadia.

Moore Park – to the West

To the west of the site is Moore Park, bounded by Anzac Parade, South Dowling Street, and Cleveland Street. The park comprises a mix of active and passive recreation opportunities that are controlled by the Centennial and Moore Park Trust in conjunction with Centennial Park, Queens Park, and the Entertainment Quarter. Moore Park is approximately 115 hectares in area and includes the ES Marks Athletics Field, an 18-hole Group One Championship Public Golf Course and Driving Range, tennis courts and netball courts.

Surry Hills – to the West

To the west of Moore Park is the suburb of Surry Hills. This suburb is similar in character to Paddington, comprising large areas of medium density terraces and a fine-grain built form and street structure. The suburb is mixed in land uses and the scale of development, with the scale of development typically increasing closer to Central Station and the CBD and incorporating a range of uses including media, design and professional services restaurants, bars and cafes. It is bordered by Oxford Street to the north, Moore Park to the east, Cleveland Street to the south, and Central Station and the rail line to the west.

4.3 Community Socio-Economic Profile

The following provides a summary of the socio-economic profile of the study area compared to the City and Inner South Area and Greater Sydney.¹ All statistics are calculated from the 2016 Census unless otherwise stated. Detailed statistics are provided in Appendix A.

4.3.1 Population and Demographics

- **Population** – As at the 2016 Census, the resident population of the study area, was 59,007. Compared to 315,557 in the City and Inner South Area, and 4,823,453 in Greater Sydney. Between 2006 and 2016, the resident population of the study area increased by around 8,900 at an average annual growth rate of 1.65%. This growth was slightly above Greater Sydney's (1.59%).
- **Population Projections** – Based on the BTS population projections (BTS, 2017), between 2016 and 2036, the population of the study area is projected to increase by around 24,000 at an average annual growth rate of 1.73%. This slightly below the average annual growth rate of the City and Inner South Area (1.86%) but above the growth rate for Greater Sydney (1.55%).
- **Age** – The residential population of the study area is relatively younger than that of the City and Inner South Area, and Greater Sydney, with a median age of 32, compared to 33 and 36 respectively for the City and Inner South Area and Greater Sydney.

Driving this relatively younger population is the 20 to 34 age cohort which makes up almost half (47%) of the residential population. By contrast, this age cohort represented around 40.96% of residents in the City and Inner South Area and 23.12% in Greater Sydney. This age cohort in the study area is sufficiently large to offset the relatively smaller proportion of residents (9.81%) aged 19 and younger. This proportion is well below the proportion in greater Sydney (24.64%) and slightly lower than in the City and Inner South area (13.73%).

The study area had a lower proportion of residents aged 50 and over at around 20.99%, compared to 22.89% in the City and Inner South and 31.14% in Greater Sydney.

The proportion of residents in the study area aged 34 to 49 was 22.5%, being comparable to both the City and Inner South area (22.42%) and Greater Sydney (21.1%).

- **Cultural Diversity** – Around 40.2% of residents in the locality were born in Australia. This is much lower than the proportion in both the City and inner South Area (44.60%) and Greater Sydney (57.06%).
- **Language** – Around 31.36% of residents reported speaking English well or very well. This was slightly higher than both the City and Inner South Area (29.57%) and Greater Sydney (29.28%).
- **Population Mobility** – The resident population appears to be relatively more mobile than both the City and Inner South Area and Greater Sydney. Just 27.69% of residents reported living in the same address as five years ago. By comparison, 34.33% of residents reported living in the same address as five years ago in the City and Inner South Area and 53.22% of residents in Greater Sydney.

The above data suggests that the locality has a relatively younger population, primarily due to the significant proportion of residents aged between 20 and 34. The area is culturally diverse, with a much smaller proportion of residents born in Australia relative to the other areas. Despite this, a relatively higher proportion of residents reported speaking English well or very well compared to the other areas. The population appears to be highly mobile with a large proportion of residents having changed address in the last five years.

¹ The study area is defined as the combined regions of Sydney – Haymarket – The Rocks, Paddington – Moore Park and Surry Hills Statistical Areas (SA2).

4.3.2 Family and Housing

The following indicators provide group level characteristics of the study area compared to the City and Inner South Area and Greater Sydney.

- **Dwelling Structure** – In the study area, only around 1% of dwellings are detached houses. This is lower than the 9.53% of dwellings in the City and Inner South area that are detached and significantly lower than the 52.51% in Greater Sydney. Understandably the study area has a much higher proportion of dwellings that are semidetached (21.23%) compared to the City and Inner South Area (19.09%) and Greater Sydney (12.91%).

Similarly, around 61.47% of dwellings were either flats, units or apartments, being slightly more than the proportion in the City and Inner South area (59.46%) and significantly more than the proportion in Greater Sydney (25.92%).

- **Housing Tenure** – Around 36.34% of dwellings were either owned outright or with a mortgage, this was lower than the proportion in the City and Inner South Area (39.39%) and much lower than the proportion in Greater Sydney (62.35%). As a result, around 60% of dwellings were being rented in the locality, compared to 56.77% in the City and Inner South area and 34.07% in Greater Sydney.

Imputed average household rent was approximately \$629.63 per week in the locality, being much higher than the imputed average weekly rent in the City and Inner South area (\$540.69) and Greater Sydney (\$462.28).

Imputed house loan repayments in the locality were \$2,182.46 per month, compared to \$2,110.94 in the City and Inner South Area and \$2,009.27 in Greater Sydney.

- **Household Composition and Family Type** – Just below half of households (49.28%) were reported as family households, being marginally lower than the 52.61% in the City and Inner South Area and significantly lower than Greater Sydney (73.63%). Around 12.08% of households were couple with children, which is slightly lower than the proportion of households in the City and Inner South Area (16.36%) and significantly lower than the proportion in Greater Sydney (37.40%). By contrast, the proportion of couple family with no children households was larger in the study area at 30.59%, compared to 28.11% in City and Inner South Area and 23.76% in Greater Sydney.

The study area also had a much higher proportion of lone person households (34.77%) compared to 33.45% in the City and Inner South Area and 21.64% in Greater Sydney. Similarly, the higher proportion of group households was also present in the study area at around 15.94% compared to 13.94% in the City and Inner South and 4.73% in Greater Sydney.

The above suggests that most of the occupied dwellings in the locality are primarily attached terraces or apartments, with a significant proportion of these dwellings being rented at weekly repayments greater than that of the City and Inner South and Greater Sydney area. Around half of dwellings were family households, with the majority of family households being a couple family with no children. A high proportion of dwellings are also occupied by lone person and group households. This demographic structure reflects a propensity for rental housing in the study area, which draws in group households and young couples. Proximity to the CBD and university combine to draw in young adults.

4.3.3 Resident Labour Force and Household Income

- **Household Income** – The imputed average household income in the study area was \$2,461.77 this was higher than the average in City and Inner South Area (\$2,171.12) and Greater Sydney (\$2,074.85).
- **Occupation** – The majority of residents were employed in white collar occupations (81.35%). This was comparable to the proportion in the City and Inner South area (81.36%) and greater than the proportion in Greater Sydney (73.21%).
- **Industry of Employment** – Accommodation and Food Services was the industry that had highest proportion of residents employed at 16.86%, this was followed by Professional, Scientific and Technical Services (16.79%). The proportion of residents employed in these industries was greater than in both the City and Inner South area and Greater Sydney. Other industries that recorded a relatively high proportion of residents was Financial and Insurance Services (9.89%), Health Care and Social Assistance (8.02%) and Retail Trade (7.01%).

The above suggests that the average household in the locality are a relatively well off, have a relatively high income and are primarily occupied in white collar professions. However, there are also many young adults working in the Accommodations and Food Services industry. These people have substantial positive impacts from greater attendances at a new stadium, as local businesses add working hours for part-time and casual staff.

4.3.4 Working Population

- **Industry** – In the study area, there was a significant concentration of jobs in the Financial and Insurance Services (23.96%) and Professional, Scientific and Technical Services (22.41%). Jobs in these industries were also the most concentrated in the City and Inner South but at a lower proportion. By contrast, in Greater Sydney, there was overall less of a noticeable concentration of jobs in these specific industries. That said, most jobs were concentrated in Health Care and Social Assistance (11.71%) and Professional, Scientific and Technical Services (10.09%). In the study area, the proportion of jobs in Health Care and Social Assistance was relatively low at 2.95%.
- **Occupation** – In the study area, a significant proportion of jobs were in white collar occupations (88.77%), being much larger than the proportion in the City and Inner South Area (83.15%) and Greater Sydney (74.81%)

The above suggests that jobs in the study area are relatively concentrated in industries such as Financial and Insurance Services and Professional, Scientific and Technical Services. A significant proportion of occupations are white collar.

4.4 Recreational and Community Infrastructure

A wide range of local recreation and community facilities are located within the study area itself and in relative proximity to the Sydney Football Stadium. Due to their proximity to the CBD and relative accessibility, these facilities provide an essential service to the local and regional community. **Table 2** – Recreational and Community Infrastructure below is a summary of the recreational and community facilities and infrastructure that could potentially be impacted by the construction and operation phase of the project.

Table 2 – Recreational and Community Infrastructure

Infrastructure type	Facility
Education and Childcare	Tertiary <ul style="list-style-type: none"> • TAFE NSW Randwick College • UNSW Randwick Campus • UNSW Art and Design Secondary <ul style="list-style-type: none"> • Sydney Boys High School • Sydney Girls High School • Memorial War Memorial College Primary <ul style="list-style-type: none"> • Paddington Public School • St Francis of Assisi Regional Catholic Primary School • Bourke Street Public School Childcare <ul style="list-style-type: none"> • SDN Surry Hills Children's Education and Care Centre • Forever Green Montessori Childcare • Moore Park's Children's Early Learning Centre • Active Kids Group • Goodstart Early Learning Kensington • KU Centennial Parklands Children's Centre • KN John H Carroll, Surry Hills • Goodstart Early Learning Bondi Junction • Kira Child Care Centre • Centennial Park Early Learning Centre
	<ul style="list-style-type: none"> • Paddington Early Childhood Health Centre • St Vincent's Private Hospital • St Vincent's Hospital Sydney
Sport and Recreation	<ul style="list-style-type: none"> • Sydney Cricket Ground • Fox Studios and the Entertainment Quarter • Centennial Park, including Moore Park and Queens Park and their associated facilities: <ul style="list-style-type: none"> – Centennial Parklands Equestrian Centre – Parade Grounds

Infrastructure type	Facility
	<ul style="list-style-type: none"> - McKay Sports Ground - Centennial Parklands Sports Centre - Moonlight Cinema Sydney - Moore Park Golf Course - Moore Park Tennis Courts - Moore Park Football/Rugby Fields - E S Marks Athletics Field • Paddington Markets
Cultural	<ul style="list-style-type: none"> • Vine Church • Paddington Kingdom Hall of Jehovah's Witnesses • Temple Emanuel Woollahra • Emanuel Synagogue • Woollahra Seventh-day Adventist Church • Church in the Market Place • Greek Orthodox Church of St • St Sophia Greek Orthodox Parish • St. Vladimir's Russian Orthodox Church Centennial Park • All Saints' Church • St George's Anglican Church Paddington • Antiochian Orthodox Cathedral of St George • Redfern Mosque • King Faisal Mosque
Shopping	<ul style="list-style-type: none"> • Surry Hills Shopping Village • Eastgate Shopping Centre • Paddington Markets • Small scale retail corridors are found within Surry Hills, Paddington, Darlinghurst, Woollahra, Bondi Junction and Kensington • The suburbs to the East, North and West have a number of dining, music and pub venues.

4.5 Transport and Access

4.5.1 Access

Being located on the periphery of the Sydney CBD, the site and surrounding precinct is highly accessible through a range of transport modes as outlined in the Transport Impact Assessment and discussed below.

- **Light Rail** – The Precinct will benefit from ongoing improvements in Sydney's light rail network. Specifically, the CBD and South East Light Rail is a new light rail line for Sydney, currently under construction. The 12km route will feature 19 stops, extending from Circular Quay, along George Street to Central Station, through Surry Hills to Moore Park, and then to Kensington and Kingsford via Anzac Parade and Randwick via Alison Road and High Street. The site will be serviced by a dedicated light rail stop, with services expected to commence in 2020 before the opening of the stadium.
- **Heavy Rail** – Central Station is located 1.8km to the west of the site and is accessible via major walking routes along Foveaux Street, Devonshire Street and Cleveland Street. No additional services are provided on event days; however, all lines are able to access Central Station including the airport line and intercity lines.
- **Buses** – Event buses run from Central Station and carry people directly into the Moore Park precinct, using the event bus loop located to the west of the SFS. The loop has a turnaround facility with the capacity to accommodate 26 buses at one time, with these dedicated buses typically operating for an hour after events. Both Anzac Parade and Moore Park Road are also major bus routes, with a number of stops available in proximity of the site. Buses along Anzac Parade also benefit from a bus only road that bypasses peak hour traffic.
- **Pedestrian** – The site benefits from an extensive pedestrian network connecting the stadium to the surrounds. The terrain surrounding the stadium is relatively flat, with the exception of the approach from Central Station to

SFS that is characterised by a steep incline. The main pedestrian thoroughfares comprise Foveaux Street and Fitzroy Street (1.5km travel distance), Cooper Street and Arthur Street (1.8km travel distance), Devonshire Street and Cleveland Street (2.4km travel distance).

- Bicycle Access and Parking** – The site is located within an extensive local and regional bicycle network. This includes off-road shared paths along Anzac Parade, Lang Road, Cleveland Street and Fitzroy Street, and an on-road dedicated bicycle lane on Moore Park Road and Greens Road. These pathways ensure that safe and direct cycle routes are available in every direction to the site. Bicycle parking rails are available in close proximity of the stadium and close to the SFS entries.
- Vehicle access and parking** – SFS is located at the junction of significant state and regional roads, which are used to access the major on-site car parks and vehicle drop-off points. Anzac Parade is the key north/south road and is three lanes in each direction and provides access to the Eastern Distributor tunnel as well as other key destinations. Moore Park Road is the key east/west road and is two lanes in each direction and also provides access to the eastern distributor. The other key roads are Lang Road and Driver Avenue, which are local roads and are used to access the four car parking areas within the Precinct. These parking areas are generally located to the north and south of the stadium and are not under the control of the SCG Trust, providing in the order of 4,700 parking spaces. An additional 750 parking spaces are available in the Sydney Girls and Sydney Boys Highschool Grounds, which are made available during key events.
- Taxis and Rideshare** – set down areas for taxis and rideshares are provided on the eastern side of Driver Avenue for pre-event drop-offs. These areas are not available after events. The only dedicated post event private vehicle pick-up area is on Errol Flynn Avenue adjacent to the Entertainment Quarter.

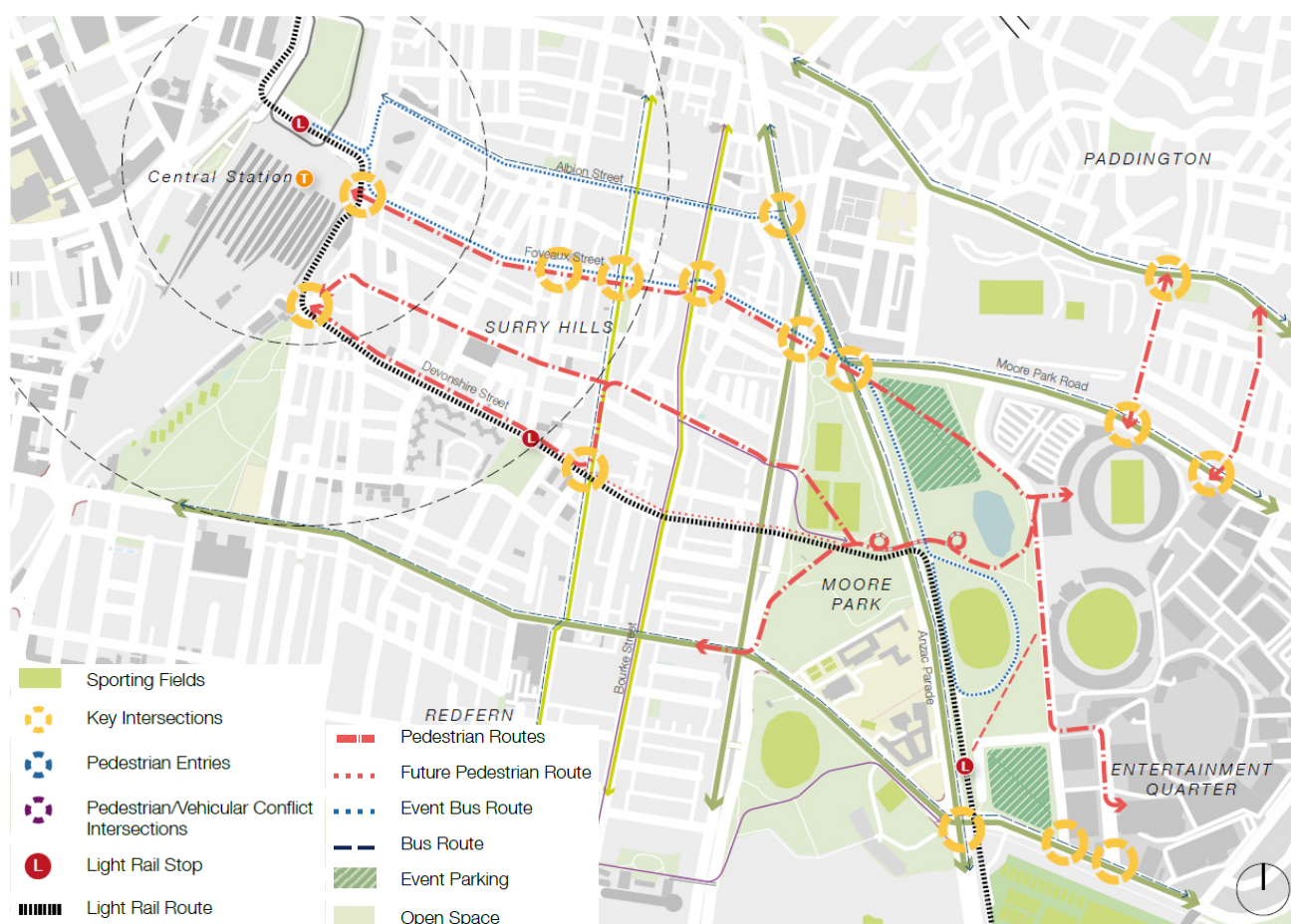


Figure 7 – Access and Movement Diagram

Source: SJB

4.6 Strategic Planning and Future Vision

Greater Sydney Regional Plan

The *Greater Sydney Region Plan* is the overarching strategy for growing and shaping the Greater Sydney Area. It sets a 40-year vision (to 2056) and establishes a 20-year plan to manage growth and change for Greater Sydney in the context of social, economic and environmental matters. The plan was adopted in March 2018 and seeks to reposition Sydney as a metropolis of three cities – the western parkland city, central river city, and the eastern harbour city. The Plan provides 10 high level policy directions supported by 40 objectives that inform the District Plans, Local Plans and Planning Proposals which follow in the planning hierarchy. Under this Plan, the site is identified within the Eastern City which is well established and serviced and is credited as being the State's greatest economic contributor. A key objective for this city is focusing on innovation and global competitiveness, that underpin continued growth. The SFS is located on the periphery of the CBD and the Eastern Economic Corridor, and is in close proximity of the CBD-South East Light Rail and is a key contributor to the ongoing competitiveness of Sydney as a global city.

Eastern City District Plan

The *Eastern City District Plan* underpins the Greater Sydney Region Plan and sets the 20-year vision for the District through 'Planning Priorities' that are linked to the Region Plan. Key Planning Priorities include infrastructure delivery and collaboration, improving the liveability of the Eastern City District, improving the productivity of the local economy and enhancing the city's sustainability. The sporting, recreation and entertainment precinct encompassing Centennial and Moore Parks, Fox Studios, and the Entertainment Quarter is considered to be an asset that brings together a diverse range of cultural, creative educational, and recreational endeavours, with the District Plan noting that "there is the potential to grow the opportunities of this precinct." Whilst the proposal does not seek to diversify the use of the site, rather it enhances the long-term vision for this site and in doing so supports the visitor economy and the attraction of local, national, and international guests to the SFS.

Sustainable Sydney 2030

Sustainable Sydney 2030 is the City of Sydney Council's vision for the sustainable development of the City to 2030 and beyond. It includes ten specific targets to achieve a sustainable Sydney, as well as 10 strategic directions to guide the future of the city, including:

- **Strategic Direction 1** – *A globally competitive and innovative city*
- **Strategic Direction 2** – *A Leading Environmental Performer*
- **Strategic Direction 3** – *Integrated transport for a connected city*
- **Strategic Direction 4** – *A city for pedestrians and cyclists*
- **Strategic Direction 9** – *Sustainable development renewal and design*

The proposed development will provide an outcome that responds to many of these strategic directions and associated targets.

5.0 Social Impact Assessment Methodology

This section describes the statutory context, relevant guidelines and methodology used for carrying out the social impact assessment. The methodology used this social impact assessment has been adopted to ensure that the social environment of communities potentially impacted by the project are best accounted for and recorded, and anticipated impacts are adequately considered and assessed.

5.1 Statutory context, policy and guidelines

5.1.1 Environmental Planning and Assessment Act 1979

Consideration of social and economic impacts is central to the Environmental Planning and Assessment Act 1979 (EP&A Act 1979), as evidenced in Clause 1.3 which sets out the objects of the Act, including:

- (a) to promote the social and economic welfare of the community and a better environment by the proper management, development and conservation of the State's natural and other resources,
- (b) to facilitate ecologically sustainable development by integrating relevant economic, environmental and social considerations in decision-making about environmental planning and assessment,
- (c) to promote the orderly and economic use and development of land,
- (d) to promote the delivery and maintenance of affordable housing,
- (e) to protect the environment, including the conservation of threatened and other species of native animals and plants, ecological communities and their habitats,
- (f) to promote the sustainable management of built and cultural heritage (including Aboriginal cultural heritage),
- (g) to promote good design and amenity of the built environment,
- (h) to promote the proper construction and maintenance of buildings, including the protection of the health and safety of their occupants,
- (i) to promote the sharing of the responsibility for environmental planning and assessment between the different levels of government in the State,
- (j) to provide increased opportunity for community participation in environmental planning and assessment.

In addition, Clause 4.15(1)(b) requires that in determining a development application, a consent authority is to take into consideration 'the likely impacts of that development, including environmental impacts on both the natural and built environments, and social and economic impacts in the locality.'

5.1.2 Relevant Guidelines

Guidelines that have been used as reference documents to guide and inform the preparation of this Social and Economic Impact Assessment include:

- Techniques for Effective Social Impact Assessment: A Practical Guide (Office of Social Policy, NSW Government Social Policy Directorate, 1995);
- Social Impact Assessment: Guidance for assessing and managing the social impacts of projects (International Association for Impact Assessment, 2015); and
- International Principles for Social Impact Assessment (International Association for Impact Assessment, 2003).

A summary of the principles contained within these guidelines is provided below.

Techniques for Effective Social Impact Assessment: A Practical Guide

The guideline document, Techniques for Effective Social Impact Assessment: A Practical Guide (Office of Social Policy, NSW Government Social Policy Directorate, 1995) provides guidance on social impact assessment for a broad range of purposes, including the assessment of public and private sector policies and programs, as well as development proposals.

The guideline document presents a number of techniques or methodologies for the assessment of social impacts, and provides a comparison of the ease of use or suitability of these methods, in order to assist in the development of a social impact assessment approach.

Social Impact Assessment: Guidance for assessing and managing the social impacts of projects

In April 2015 the International Association for Impact Assessment (IAIA) published a guideline document titled Social Impact Assessment: Guidance for assessing and managing the social impacts of projects (IAIA2015). The documents purpose is 'to provide advice to various stakeholders about what is expected in good practice social impact assessment (SIA) and social impact management processes, especially in relation to project development.'

It states that there are four distinct phases in Social Impact Assessment, these being:

- Understanding the issues – during Phase 1 some of the key tasks undertaken include developing an understanding of the proposed project, defining a social area of influence, profiling the local community, consulting with the community, scoping the issues and assembling the baseline data.
- Predicting, analysing and assessing the likely impact pathways – during Phase 2 the key tasks include predicting the likely social changes and impacts, identifying the indirect impacts and cumulative impacts (if any), understanding the affected party responses and reviewing the significance of any changes.
- Developing and implementing strategies (e.g. management and mitigation measures) – Phase 3 involves addressing negative impacts, enhancing benefits and opportunities, developing strategies for managing and mitigating potential impacts, and where relevant implementing ongoing social performance plans.
- Designing and implementing monitoring programs – the final Phase of the process involves setting up an evaluation process and procedure to and monitoring the impacts and ensure their effective management throughout the project lifecycle.

Evaluating social impacts

The assessment of both positive and negative impacts has been guided by the process outlined within the IAIA's Social Impact Assessment: Guidance for assessing and managing the social impacts of projects (IAIA 2015). The assessment contained within Section 6 includes an evaluation of the significance of each potential negative social impact without mitigation. It takes into consideration:

- the stakeholders expected to be adversely affected;
- when the potential impact is expected occur, for example, demolition, construction or operation;
- the extent, duration, severity and sensitivity of the potential impact;
- the potential level of risk posed by the impact from the perspective of those expected to be affected, having particular regard to:
 - the consequence of the potential impact, that is, minimal, minor, moderate, major or catastrophic (or reasonable worst-case)
 - the likelihood of the potential impact – for example rare, unlikely, possible, likely and almost certain.

International Principles for Social Impact Assessment

In March 2003 the International Association for Impact Assessment (IAIA) published a guideline document titled International Principles for Social Impact Assessment (2003). The guideline is a statement of the core values of the Social Impact Assessment community, which also set out a series of core principles to guide the practice of considering 'the social' elements within practice of environmental impact assessment. The intent of the document is to:

- 'Assist in the development of legislation and policy at the national level;
- Provide standards for SIA practice in international contexts (transboundary projects, development cooperation, foreign investments, international banking);
- Increase the appeal of SIA to a wider range of audiences, through increasing its legitimacy/ standing;
- Establish minimum standards for SIA practice;
- Provide an articulation of best practice in SIA as a model to aspire to;
- Remove confusion over terminology by establishing a definitive glossary;
- Establish the appropriate scope of the social component of impact assessments;
- Promote the integration of SIA in all impact assessments (especially environmental impact assessment and strategic environmental assessment).'

The document defines Social Impact Assessment as 'the process of analysing, monitoring and managing the intended and unintended social consequences, both positive and negative, of planned interventions (policies, programs, plans, projects) and any social change processes invoked by those interventions. Its primary purpose is to bring about a more sustainable and equitable biophysical and human environment.'

The document identifies eight key factors as a means of identifying, conceptualising and defining social impacts of a project, these being:

- people's way of life: how they live, work, play and interact with each other on a day-to-day basis
- their culture: in terms of their shared beliefs, customs, values and language or dialect
- their community: its cohesion, stability, character, services and facilities
- their political systems: the extent to which people are able to participate in decisions that affect their lives, the level of democratisation that is taking place, and the resources provided for this purpose
- their environment: the quality of the air and water people use; the availability and quality of the food they eat; the level of hazard or risk, dust and noise they are exposed to; the adequacy of sanitation, their physical safety, and their access to and control over resources
- their health and wellbeing: health is a state of complete physical, mental, social and spiritual wellbeing and not merely the absence of disease or infirmity
- their personal and property rights: particularly whether people are economically affected, or experience personal disadvantage which may include a violation of their civil liberties
- their fears and aspirations: their perceptions about their safety, their fears about the future of their community, and their aspirations for their future and the future of their children.

This SEIA seeks to respond to the intent, objectives and principles outlined in the IAIA, and accordingly has used the guidance provided by this document to assist with the identification, consideration and assessment of the social impacts associated with the project.

5.2 Methodology

5.2.1 Methodology for the Assessment of Social Impacts

A methodology has been prepared for assessing the social impacts of the proposal drawing from the guidelines discussed above. The assessment considers the effects of the project on the social fabric of the community. It categorises potential impacts into two distinct phases, the initial phase being demolition (the subject of this SSDA) and construction and the later phase being the operation of the stadium once complete.

The method used to identify, consider and assess the social impacts of the project is as follows:

- Step 1 – Define the study area boundary within which the Proposal may result in potential impacts;
- Step 2 – Identify the stakeholders that may be potentially impacted, positively and negatively, by the Proposal;
- Step 3 – Identify the social indicators, which socio-economic impacts will be assessed and monitored against;
- Step 4 – Undertake a desktop review of available technical information and data (e.g. ABS data) to define and understand the demographic profile of the local community profile;
- Step 5 – Identify and define the project components or activities that are likely to result in potential impacts, both positive and negative;
- Step 6 – Undertake review of technical documentation and liaise with technical specialists to identify potential social impacts of key aspects of the project, for example, impacts from the development on heritage, accessibility, traffic, noise, air quality, landscape and visual amenity;
- Step 7 – Predict, analyse and categorise potential impacts using a social risk matrix to define the likelihood of the impact and the consequence level; and
- Step 8 – Recommend management measures to address socio-economic impacts.

5.2.2 Methodology for supporting analysis for assessment of operational impacts

The purpose of the methodology for this section is to assess the nature of social impacts from operations at the redeveloped stadium. While the State Significant Development Application submitted to the Department of Planning and Environment seeks approval for demolition only of the Sydney Football Stadium. For completeness and to ensure that the social impacts of the project are considered in totality, this SIA also considers and evaluates the potential impacts of the proposed development once operational (which will be subject to further operational analysis as part of the Stage 2 SSDA).

The concept of a primary area of influence or zone of impact is standard in practice for economic impact assessments, however, it is not directly transferable to social impact assessments. A 'social area of influence' consists of the people potentially impacted by a project. Affected peoples include both 'communities of place' and 'communities of interest'.

The location of affected people frequently does not neatly align with the geographic boundaries or the area of influence determined by the environmental impact of a project. This situation arises for the current project purpose. For the redeveloped stadium operations, the 'communities of interest' reach across Greater Sydney, the rest of NSW and interstate.

It is worth noting that social impacts do not necessarily decrease in intensity with distance from the project site. People are connected by a vast array of linkages and networks. This perspective will be increasingly important for this project, as the future Metro rail services and light rail combine to reduce travel times for many residents of Greater Sydney.

This transport infrastructure will also partially obviate the need for car travel to events at the redeveloped stadium, which would be expected to reduce social costs for 'communities of place' (less congestion and demand for car parking off-site) and increase social benefits for 'communities of interest' attending events. However, while these factors are leveraged already from the transport investment, they are amplified for the stadium project by the projected increased rate of attendance.

To project social impact effects for 'communities of interest', our methodology considers connections between the levels of event attendance, levels of sporting club membership and stadium amenity. The fundamental issue

addressed is the recent evidence of flat attendance at SFS sporting events, at levels that are well below the stadium's seating capacity.

By implication, the social operational effects are expected to be heavily skewed to the 'communities of interest' who participate in events, rather than the 'communities of place' who are important but live and work in proximity to a stadium that has operated for three decades. We note the complexity of impact analysis for a stadium redevelopment, which is currently planned to deliver seating capacity on par with the existing facility and within the established site but with a substantially improved sportscape amenity (i.e. both inside and outside).

In terms of the criteria for amenity effects for the potential patrons of a redeveloped stadium, the table below sets out the primary features of a stadium that are used for social impact assessment, with some observations based on other stadiums across Australia.

Range of amenity benefits drawn by patrons

Australian cities have some of the most modern sporting and entertainment facilities in the world. Successful Australian modern stadia and surrounding precincts provide an outing beyond a mere sporting or cultural event. Modern Australian stadia exhibit the following features, which deserve strong consideration in the patron amenity benefits for the proposed project:

Maximising the event experience for patrons

The focus of maximising a stadium experience goes beyond seating and a playing arena. A stadium should be a destination for patrons to not only watch an event but also enjoy dining, entertainment, retail and community facilities. Melbourne's Docklands is the prime example of a stadium which has been turned into a broader precinct.

All weather protection

Stadia today aim to provide cover to the majority of patrons (as measured by the 'drip line'). Any new stadium should aim to cover more than 90% of patrons from rain, with the potential for a fully enclosed retractable roof e.g. Docklands. Maximum weather protection will encourage patrons to attend an event under any weather conditions.

Optimal viewing conditions for patrons

Spectators need to feel close to the action, and any new stadium design should follow the example set by Docklands and Suncorp Stadium. To cater for corporate patrons and those willing to spend more on game day, a new stadium should look to the Docklands' Medallion Club or the corporate facilities at the MCG where an event can be combined with fine dining and interactive media to enhance the viewing experience.

Variety of revenue streams

National and international sporting seasons do not produce year-round fixtures. To ensure that the stadium receives year-round use, it should cater for a variety of international grade events (soccer, rugby) to ensure the ability to deliver female codes and double-header sporting events; as well as concerts and other events.

Docklands has some 70 events annually, and while it is more heavily utilised during the AFL season, it also caters for large concerts, A-League Soccer and Rugby Union matches. Function centres and commercial facilities provide further revenue streams and greater stadium use.

Easy transport access

The success of Docklands, Suncorp Stadium and the MCG is in part due to their ease of access via public transport. A new centrally located stadium in Sydney would provide the perfect opportunity to further integrate public transport with the CBD, encouraging use of public transport not only on match days but also at other times. Light rail will deliver capacity to the stadium, and also enable patronage at restaurants and cafes along its route.

Enhanced city environment

Ideally, a new stadium should be a 'gateway' within the city of Sydney, providing not only a sporting and entertainment arena but a whole precinct to be enjoyed by locals and visitors. In the Adelaide context there has been rejuvenation of Adelaide's West End with hotels, restaurants, bars and open space. Other improvements include connectivity with other North Terrace facilities and the River Torrens.

Options for patrons pre/post event

Game day is an exciting day as fans treat big sporting events as major social occasions. There is a need for comprehensive pre and post-game facilities to cater for such excitement.

In Brisbane, Caxton Street traders enjoy booming economic conditions thanks to the Suncorp Stadium. Melbourne's CBD comes to life on the morning of game day, with shops filled with sports fans, before heading off to the match.

5.3 Study area definition

For the purpose of the social impact assessment, the primary study area has been chosen taking into consideration the need to factor in both local community impacts and those likely to occur on a broader scale. Economic and employment opportunities created by the Sydney Football Stadium Redevelopment Project are likely to have wider implications for the eastern suburbs, Greater Sydney and NSW. Whilst this is the case the social impacts from the proposed development will be felt the greatest within the immediate surrounds of the stadium, for example impacts associated with the demolition and construction of the stadium (i.e. amenity values, access, noise, air quality etc) will be very localised. Longer term impacts such as visual amenity, traffic, connectivity, crime and safety and community sense of place, are also anticipated to occur within the close proximity to the project.

A small study area for the assessment of some social impacts has been used because the Stage 1 DA impacts will be felt in the immediate area. A map showing this study area is provided at **Figure 8**.

Social impacts from the proposed development will also be felt at a wider level. Accordingly, a secondary study area has been considered as part of the social impact assessment. This secondary study area matches the boundary of the Sydney Greater Capital City Statistical Area (GCCSA) which represents the social boundary of Greater Sydney. For the purposes of assessing the local population and wider social impacts of the stadium redevelopment, Greater Sydney is also considered to help demonstrate the unique population characteristics within the local area. The range and degree of social impacts Greater Sydney is likely to experience from the stadium redevelopment is described in the following sections. We note that distinct study areas are used for the Economic Impact Assessment (as defined in section 7).



 Primary Study Area

Figure 8 – Social Impact Assessment study area

Source: Ethos Urban

5.4 Key stakeholders

Key stakeholder groups that were taken into consideration when carrying out this social impact assessment are as identified in **Table 3 – Key Stakeholders** are listed below. We note that a separate engagement with stakeholders was undertaken (see Ethos Urban, 2018)

Table 3 – Key Stakeholders

Stakeholder group	Stakeholder
SFS existing tenants	<ul style="list-style-type: none"> • National Rugby League • Rugby Australia • Football Federation Australia • Australian Football League • Sydney Roosters • NSW Waratahs • Sydney FC • University of Technology Sydney (UTS) • Cricket NSW • Medical imaging and health services
Stadium users	<ul style="list-style-type: none"> • SCG Trust members • General patrons and fans
Local business and land owner/tenant community	<ul style="list-style-type: none"> • Chamber of commerce • Australian Turf Club- Randwick • Sydney Boys High School • Sydney Girls High School • Entertainment Quarter + Fox Studios • Oxford Street Business Association • Moore Park road businesses and outlets • Nearby businesses
Community stakeholders	<ul style="list-style-type: none"> • Moore Park Road and south Paddington residents • Roberts Road residents • Centennial Park Residents Association • Moore Park Residents Association • Paddington Society • Paddington & Darlinghurst Community Working Group • Centennial Park and Moore Park Trust Consultative Committee • COFA (UNSW)

5.5 Data sources

The following data sources have been used to inform the social impact assessment.

- *Social Impact Assessment: Guidance for assessing and managing the social impacts of projects* (IAIA, 2015).
- Australian Bureau of Statistics (ABS). 2016. *2016 The Census of Population and Housing*. (ABS, 2016)
- Australian Bureau of Statistics (ABS). 2011. *2011 The Census of Population and Housing*. (ABS, 2011)
- Australian Bureau of Statistics (ABS). 2006. *2006 The Census of Population and Housing*. (ABS, 2006)
- Australian Bureau of Statistics (ABS). 2017. *Regional Population*
- Arup. 2018a. *Groundwater Assessment Report*. (Arup, 2018a).
- Arup. 2018b. *Noise and Vibration Impact Assessment*. (Arup, 2018b)
- Arup. 2018c. *Transport Assessment Report*. (Arup, 2018c)
- Arup. 2018d. *Stormwater and Flooding Assessment*. (Arup, 2018d)

- Aurecon. 2018a. Environmentally Sustainable Design Strategy for Concept Proposal and Statement for Stage 1 Demolition. (Aurecon, 2018a)
- Aurecon. 2018b. Infrastructure Management Plan. Aurecon (2018b).
- Aver. 2018a. Allianz Stadium Construction Management Plan, including Waste Management Strategy. (Aver, 2018a)
- Bureau of Transport Statistics, 2017. Population Projections. (BTS, 2017)
- City of Sydney (2015). 2030 in Your Village. Accessed via: cityofsydney.nsw.gov.au/vision/towards-2030/communities-and-culture/2030-in-your-village in April 2018. (City of Sydney, 2015)
- Curio projects. 2018a. Archaeological Assessment for Sydney Football Stadium, Stage 1 Concept Design. (Curio, 2018a).
- Curio projects. 2018b. Heritage Impact Statement for Sydney Football Stadium, Stage 1 Concept Design SSDA. (Curio, 2018b)
- Douglas Partners. 2018. Preliminary Site Investigation (Contamination). (Douglas Partners, 2018)
- Ethos Urban. 2018. Stakeholder and Public Engagement Strategy. (Ethos Urban, 2018)
- Final Business Case, 2018. 2018. Final Business Case Summary: Sydney Football Stadium Redevelopment, March 2018 (Final Business Case, 2018).
- Greater Sydney Commission. 2018. Metropolis of Three Cities. (accessed via greater.sydney/metropolis-of-three-cities April 2018). (GSC 2018).
- Google Maps www.google.maps.com
- Jacobs. 2018. Biodiversity Development Assessment Report. (Jacobs, 2018)
- Remplan www.remplan.com.au
- Roads and Maritime, 2013. Roads and Maritime Environmental Impact Assessment Practice Note - Socio-economic Assessment (EIA- N05 (Roads and Maritime, 2013)).
- SCG Trust. 2018a. Data for Workers by Events. (SCG Trust, 2018a)
- SCG Trust. 2018b. Attendance by Postcode data. (SCG Trust, 2018b).
- SCG Trust. 2018c. *S.F.S. Attendances Data* (aftables.com, 2018) (accessed April, 2018c)
- SJB. 2018a. Urban Design and Public Realm Guidelines (SJB, 2018a)
- SJB. 2018b. Concept Proposal Drawings
- SJB. 2018c. Demolition Plans
- Transport for NSW. 2018. B-line Bus. (Accessed via transport.nsw.gov.au/projects/b-line-bus April 2018). (TfNSW, 2018)
- Walkscore, 2018. Walk Score (Accessed via www.walkscore.com May 2018). (Walkscore, 2018).

5.6 Assumptions and limitations

Key assumptions that underpin this social assessment are outlined below:

- Key stakeholder groups are as identified and described in section 5.4 of this report.
- Assumption that the proposed development occurs as defined in this State Significant Development Application.
- Assumption that the new stadium will result in forecast benefits as described in the final business case, these being:
 - More events – estimated within the Sydney Football Stadium Final Business Case at between 49 and 52 events per year.
 - Increased attendance – Sporting attendance estimated to increase by up to 15% in an average year. The annual average attendance is expected to be as high as 1,280,320, with 11% of these people coming from outside NSW.

- Reduced operating costs – many of the shortcomings of the current stadium, such as restricted access and egress routes and limited concourse spaces, are currently managed by allocating additional staff to oversee patron safety. These arrangements, and associated cost, would not be required in a new stadium.
- The social impacts of the proposed development are to be assessed in two separate phases as follows:
 - Phase 1 - Impacts experienced during the demolition and construction phase of the proposed development; and
 - Phase 2 – Impacts received during the operational phase. The impacts during this phase are to be assessed as being the difference between the base case scenario (i.e. the existing stadium) verse the proposed scenario (i.e. the proposed stadium).
- Sydney Light Rail will be complete and fully operational by the end of 2019.
- The estimates of spending and related impacts presented in this report are based on the scale of attendance increase from a redeveloped stadium, from existing and new events at the facility. These operating impacts are based on a variety of data, including information provided by the sporting codes, the SCG Trust and other stadium operators, and the results of surveys of attendees.
- It should be noted that Ethos Urban has not conducted an independent market study or surveys to validate the increased scale of attendance for a reconstructed stadium. The purpose of this report is to evaluate the likely composition of social and economic effects. Exemplars of activities at recently developed new facilities are evaluated, to provide reference metrics.

6.0 Social Impact Assessment

As outlined in the Social Impact Assessment Guideline prepared by IAIA (2015), social impacts vary in their nature and can be positive or negative, tangible or intangible, quantifiable, partly quantifiable or qualitative. Social impacts can also be experienced or perceived differently by different people and groups within a community

Ultimately there are two main types of social impacts that will arise as a result of the proposal, these being direct impacts caused by the project and which cause changes to occur within the existing community, as measured through the use of social indicators, such as population, health, and employment, and indirect impacts that are generally less tangible and more commonly relate to matters such as community values, identity and sense of place.

Taking into consideration the study area and community socio-economic profile, the following section outlines, considers and assesses the potential impacts of the proposed Sydney Football Stadium Redevelopment. For the purposes of this social impact assessment, the impacts are considered and assessed in two distinct phases as outlined earlier, being the proposed demolition and construction phase, and the operational phase. It should be noted that the State Significant Development Application submitted to the DP&E seeks consent for demolition of the stadium only at this stage.

The social risk matrix outlined in the Social Impact Assessment Guideline (IAIA, 2015) has been adapted for the purposes of undertaking the social impact assessment of the proposed Sydney Football Stadium Redevelopment. Each impact has been assessed as either 'positive', 'negative' or 'neutral' and assigned an overall risk that considers both the likelihood of the impact occurring and the consequence should the impact occur (Figure 9 – Social Risk Assessment Matrix). Using this approach allows for the categorisation of each impact.

			Consequence Level				
			1	2	3	4	5
			Minimal	Minor	Moderate	Significant	Major
Likelihood Level	A	Almost certain	A1	A2	A3	A4	A5
	B	Likely	B1	B2	B3	B4	B5
	C	Possible	C1	C2	C3	C4	C5
	D	Unlikely	D1	D2	D3	D4	D5
	E	Rare	E1	E2	E3	E4	E5

Social Risk Rating			
	Very Low	Low	Moderate
	High		

Figure 9 – Social Risk Assessment Matrix

Source – Ethos Urban

6.1 Assessment of Social Impacts

An assessment of the social impacts associated with the demolition/construction phase, and operational phase of the Sydney Football Stadium Redevelopment is provided in the following section. Impacts have been grouped in accordance with the social factors identified in **Table 4**. Where applicable, the pre-mitigation impact for each topic has been assessed in relation to specific group or community that may be impacted. An assessment of the likelihood, consequence and then overall significance of each impact has also been undertaken in reference to the Social Risk Assessment Matrix presented at **Figure 9**.

Key assumptions underlying this assessment are noted in Section 5.6 of this report.

Table 4 – Social factors and impacts considered

Project phase	Social factors	Impacts considered
Demolition & construction	<ul style="list-style-type: none"> • People's way of life • Community cohesion and character • Access to services and facilities • Local environment • Community health and well-being • People's personal and property rights • People's fears and aspirations 	<ul style="list-style-type: none"> • Amenity • Accessibility • Built environment • Community • Cultural and heritage values • Environment and biodiversity • Traffic and transport • Access to professional sporting and entertainment events •
Stadium operation	<ul style="list-style-type: none"> • People's way of life • Community cohesion and character • Access to services and facilities • Local environment • Community health and well-being • People's personal and property rights • People's fears and aspirations 	<ul style="list-style-type: none"> • Visitor experience • Capacity and attendance • Community • Noise and Vibration • Transport and Accessibility • Access to professional sporting and entertainment events

6.2 Impacts of demolition and construction

An assessment of the social impacts associated with the demolition, site preparation and preliminary construction of the existing stadium are discussed in the following section. These impacts have been considered in the context of their temporary and short-term nature i.e. 3-year demolition and construction period.

It is noted that the State Significant Development Application that has been submitted to the Department of Planning and Environment seeks approval for demolition only at this stage. Whilst this is the case for completeness, this social impact assessment considers impacts during both demolition and construction. Taking this into consideration, the following topics and themes are evaluated:

- Amenity
- Accessibility
- Built environment
- Community
- Cultural & heritage values
- Environmental and biodiversity
- Traffic and transport

6.2.1 Amenity

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Noise and vibration					
The existing noise environment around the SFS is influenced by a number of noise emitters including traffic noise, aircraft noise, heavy vehicles, construction works associated with light rail and other development works that will have direct impacts. Likely construction activities will include additional noise associated with intrusive works such as site preparation works, demolition of roof structure and concrete structural components, and breaking up of concrete.	Negative	SFS existing tenants Local businesses and surrounding local community	Almost certain	Moderate	High (A3)
The Noise and Vibration Assessment (undertaken by Arup, 2018b) identifies six (6) noise catchment areas (NCA) broadly grouped to the north, east and west of the SFS. Based on 'worst case' assumptions, the assessment found that residential properties located to the north of Moore Park Road and east of Poate Road will experience the highest elevated noise levels during the stadium demolition phase, which is anticipated to last approximately 10-12 months. Elevated noise levels, albeit lower than during demolition, are also forecast during the construction phase, which is anticipated to take a further 20-24 months.	Negative	As above	Almost certain	Moderate	High (A3)
A number of other sensitive non-residential receivers are also located within these NCA including active recreation areas, child care centres, educational institutions, places of worship and the Paddington Town Hall. The assessment (Arup, 2018b) found that the UTS Rugby Australia Building, Sydney Boys and Girls High School, Moore Park and Paddington Town Hall will experience an exceedance in noise management levels during both the demolition of ancillary buildings and the main stadium structure. The highest noise and vibration impacts will occur during the stadium demolition stage. Impacts from vibration will have a temporarily effect on local amenity and are not considered to pose a significant risk to public health nor impact on any other sensitive buildings.	Negative	Local business and land owners Local community	Almost certain	Minimal	Moderate (A1)
The assessment (Arup, 2018b) anticipates construction works will generate up to 30 – 40 trucks per day. The Noise and Vibration Assessment (Arup, 2018b) estimates that the noise and vibration generated as a result of the construction traffic is will have little additional impact on the existing ambient noise environment within the locality.	Negative	SFS existing tenants Local business, land owners and community	Almost certain	Minimal	Moderate (A1)
Visual					
<p>The SFS is prominently positioned in its surrounding landscape and can be viewed from many approaches. The demolition of the stadium will have a temporary impact on a range of view lines and vistas around the stadium as follows:</p> <p>Views of high significance</p> <ul style="list-style-type: none"> From the cricket ground and its stands and the SFS to the Fox Studios clocktower Streetscape views of the mature fig from Moore Park Road <p>Views of moderate significance</p> <ul style="list-style-type: none"> Views of the SFS from within the SCG site 	Negative	Local community Greater Sydney Community	Almost certain	Minimal	Moderate (A1)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
<ul style="list-style-type: none"> Views to Moore Park and Kippax Lake from the Gold members car park and the main entrance Streetscape views of the SFS Distant night views of the floodlit grounds 					
The SFS has a saddle shaped roof which provides partial weather protection to spectators. Designed by Phillip Cox Richardson Taylor and Partners in 1985, the saddle shaped roof is visible from various aspects around the stadium and from an urban design perspective is a key wayfinding landmark. The demolition of the stadium will significantly change the skyline of Moore Park and reduce the aesthetic values inherent to the local built form around the site, however the loss of this visual landmark will be temporary until such time as the new replacement stadium is built.	Negative	Local community	Almost certain	Minor	Moderate (A2)
Within the immediate vicinity of the SFS, the site will be boarded by construction hoarding and fencing that will prevent sightlines into the site, particularly to pedestrians and users of Moore Park during the demolition and construction period.	Negative	Existing Tenants Stadium Users Local community	Almost certain	Minimal	Moderate (A1)
Odour					
Any odour impacts associated with demolition and construction will be minimal and can be managed and mitigated via a detailed construction management plan (Aver, 2018). It is not expected that there will be any odour impacts associated with the demolition of the stadium.	Neutral	Local community	N/A	N/A	N/A
Dust					
It is expected that dust particles associated with the buildings and works will be generated as common with the demolition and construction of any development site. Mitigation measures to manage airborne dust particles arising from the demolition of the stadium are outlined in the Construction Management Plan (Aver, 2018).	Negative	SFS existing tenants Local business, land owners and community	Likely	Minimal	Low (B1)
Summary					
There will be a range of amenity impacts associated with the demolition of the stadium which will primarily affect communities directly within, and adjacent to the SFS site. Noise and vibration impacts have been assessed as the most significant to these communities, however it is noted that these impacts will generally occur during the day and will be temporary in nature. It is expected that the majority of amenity-related impacts can be minimised through mitigation measures, restricted demolition hours and construction management practices.					
Recommended mitigation measures					
Mitigation measures should be implemented to reduce the impacts associated with noise and vibration, visual amenity, and dust during the demolition phase. Relevant mitigation measures are outlined in the Construction Management Plan prepared by Aver (2018) and the Noise and Vibration Assessment prepared by Arup (2018) and are summarised below:					
<ul style="list-style-type: none"> All construction works would be carried out in accordance with the relevant legislative requirements including <i>Clause 102 of State Environmental Planning Policy (Infrastructure) 2007</i> Australian Standard 2436-1981 "Guide to Noise Control on Construction, Maintenance and Demolition Sites" and <i>Interim Construction Noise Guideline (DECCW, 2009)</i>. Appropriate erosion and sediment controls shall be in place before commencement of works and will be maintained throughout construction activities, until the site is landscaped and/or suitably revegetated including wetting down and suppressing airborne dust particles. 					

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
<ul style="list-style-type: none"> • Ensure all plant and machinery involved in the works will be regularly serviced and checked for exhaust emissions. • Future demolition and constructions works are to be undertaken within standard construction hours and in accordance with any future development consent. • A Noise Management and Vibration Plan is to be prepared that identifies the specific plant and construction material to be used, the likely levels of noise and the scheduling of activities and outlines the management and mitigation measures to be implemented during demolition/construction. • All equipment and machinery are to be turned off when not in use to minimise excessive noise. • Consider vibration monitoring at the nearest potential affected building and assess levels of noise against minimum working distance practice guidelines. • Manage and monitor any complaints and keep records of actions through a complaints log. 					

6.2.2 Accessibility

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Construction traffic					
Primary site access for demolition works will be from Moore Park Road which is likely to be accessed via the Eastern distributor and Cross City Tunnel. Inbound and outbound construction vehicle routes are proposed along Moore Park Road, Anzac Parade, Foveaux Street, South Darling Street, Oxford Street and Cleveland Street (Arup, 2018c).	Negative	Motorists accessing the arterial roads around the SFS	Almost certain	Minor	Moderate (A2)
Cumulative construction traffic generated by the demolition works of the SFS and the Sydney Light Rail is expected to be neutral as the majority of construction works associated with the Sydney Light Rail project are expected to be completed at the same time as the commencement of demolition works (Arup, 2018c).	Negative	Local community	Almost certain	Minimal	Moderate (A1)
Pedestrian accessibility					
Impacts relating to pedestrian accessibility will be experienced within the immediate vicinity of the site. During demolition and construction, pedestrian connections, pathways and linkages through the site, requiring pedestrians to utilise public footpaths. Pedestrian connectivity issues may also be exacerbated by the concurrent construction works associated with the Light Rail (to the south-west of the site) which already disrupts permeability and pedestrian flow through Moore Park	Negative	Local community	Almost certain	Moderate	High (A3)
Pedestrian accessibility within the broader area and along the main thoroughfares (e.g. Foveaux St and Fitzroy St) is not expected to be directly impacted beyond existing conditions.	Neutral	N/A	N/A	N/A	N/A
Cycling accessibility					
The site is located within an extensive local and regional bicycle network. This includes off-road shared paths along Anzac Parade, Lang Road, Cleveland Street and Fitzroy Street, and an on-road dedicated bicycle lane on Moore Park Road and Greens Road.	Neutral	N/A	N/A	N/A	N/A

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Bicycle access around the site will not be impacted. Within the wider precinct it is not expected that cyclists will be significantly impacted due to the availability of other linkages within the Moore Park Precinct (Arup, 2018c).					
Access to existing buildings					
<p>The Rugby Australia Building and the NRL Headquarters are proposed to be retained during demolition and construction. Vehicular and pedestrian access is also proposed to be maintained to the following areas during the demolition and construction of the site:</p> <ul style="list-style-type: none"> • Entry to Paddington Lane off Moore Park Road to the SCG Basement; • Entry to the NRL building off Driver Avenue; and • Entry off Moore Park Road into the Rugby Australia building 	Neutral	N/A	N/A	N/A	N/A
Whilst the access to remaining buildings will still be possible, infrequent disruptions may occur from time to time due to construction vehicles entering and exiting the site. It is proposed all demolition access and waste removal is to be via Moore Park Road (to the north of the SFS). As shown in the Construction Management Plan (Aver, 2018) the proposed demolition zone is concentrated to the east of the site and does not overlap with the existing NRL and Rugby Australia buildings.	Negative	Existing tenants	Almost certain	Significant	High (A4)
Access to SCG					
<p>Located directly adjacent to the south of the SFS is the northern plaza and Noble Bradman stand, which shares a common boundary with the SCG. A basement under the northern Noble Bradman stand (SCG) will be retained during the demolition process and may eventually connected to the new SFS basement loading area. Access to the Noble Bradman stand will still be possible during the demolition phase.</p> <p>Access to other gates and entrances associated with the SCG will continue to operate as normal.</p>	Neutral	N/A	N/A	N/A	N/A
Bus services will continue to service this precinct and it is expected that, upon completion, the light rail service will supplement the movement of patrons transferred to events at the SCG.	Neutral	N/A	N/A	N/A	N/A
Access to recreation and open space					
Moore Park includes a range of sporting and recreation facilities such as the Tramway Oval and Kippax Lake Field. It is envisaged that these facilities will remain open and accessible to the public during the construction period, however their ongoing use during the redevelopment may be impacted by noise and other amenity related issues.	Negative	Local community	Likely	Minimal	Low (B1)
Access to recreation and open spaces facilities in the broader area (for example Centennial Park, Paddington Reservoir Gardens and Ward Park) will not be directly impacted from the demolition and construction. There is a possibility of minor amenity impacts, but the extent of such impacts would be minimal.	Negative	Local community	Unlikely	Minimal	Very Low (D1)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Access to the Entertainment Quarter, Fox Studios & Driver Avenue					
The Entertainment Quarter is located to the south of the SFS and is relatively isolated from the broader precinct and operates largely independent from the stadium. Primary access to the EQ is from Lang Road with some delivery and service access via Driver Avenue. Given that construction vehicles will access the SFS site via Moore Park Road it is anticipated that impacts associated with access to the EQ will be neutral.	Neutral	N/A	N/A	N/A	N/A
Fox Studios are located to the south of the SFS and access their site through Driver Avenue. Given that construction vehicles will access the SFS site via Moore Park Road it is anticipated that impacts associated with access to Fox Studios will be neutral.	Neutral	N/A	N/A	N/A	N/A
The northern portion of Driver Avenue will provide another primary access point for demolition works and construction vehicles. Given the low vehicles volumes on Driver Avenue the impact is expected to be neutral.	Neutral	N/A	N/A	N/A	N/A
Access to education facilities					
Both Sydney Boys and Girls High Schools are located within the Moore Park west and are not directly in proximity to the immediate demolition site. It is not expected that any direct impacts associated with access to the schools will occur however periphery impacts associated with movement of vehicles and pedestrian permeability may be affected.	Negative	Local community	Possible	Minimal	Very Low (C1)
Other education facilities within proximity to the SFS (located in Paddington and Surry Hills) are not expected to be directly impacted.	Neutral	N/A	N/A	N/A	N/A
Access to community facilities					
There are a range of institutional, civic and recreational facilities located within the neighbourhoods of Surry Hills and Paddington. Access to these facilities is not expected to be directly impacted by future demolition or construction works. As discussed above other amenity impacts (such as noise) may be experienced by those facilities in close proximity to the SFS.	Negative	Local community	Unlikely	Minimal	Very Low (D1)
Access to residential areas					
The most immediate residential neighbourhoods within proximity to the SFS are located to the north of Moore Park Road and to the east of Poate Road. Access to general residential areas within Paddington and Surry Hills is not expected to be directly impacted. There will be a reduction in overall traffic circulating within the local residential streets of Paddington and Surry Hills during the demolition and construction period, particularly on weekends.	Neutral	N/A	N/A	N/A	N/A
Summary					
It has been assessed that the overall interruption to existing traffic movements will not result in significant impacts to the surrounding road network. All public pathways and cycleways will remain operational during demolition works and as such impacts are considered negligible. Recreation and open spaces around the SFS will remain open and accessible during the demolition phase.					

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Recommended mitigation measures					
Mitigation measures should be implemented to reduce the accessibility impacts within and around the site associated with the demolition of the stadium. Relevant mitigation measures are outlined in the Traffic and Transport Assessment Report (prepared by Arup, 2018c) and the Construction Management Plan (prepared by Aver 2018). A summary of these recommendations is provided below.					
<ul style="list-style-type: none"> A Construction Traffic and Management Plan (CTMP) should be prepared and implemented prior to commencement of any demolition works. Among other management mitigation measures, the CTMP should include the following as per the Traffic and Transport Assessment (Arup, 2018c): <ul style="list-style-type: none"> Truck loads would be covered during transportation off-site for sensitive loads; Establishment and enforcement of appropriate on-site vehicle speed limits (20km/h), which would be reviewed depending on weather conditions or safety requirements; Neighbouring properties would be notified of construction works and timing; Materials would be delivered, and spoil removed during standard construction hours; and Deliveries would be planned to ensure a consistent and minimal number of trucks arriving at site at any one time. 					

6.2.3 Built Environment

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Public domain					
Removal of trees, vegetation and landscape features within the site will be required. The removal of these features will result in a short-term temporary amenity loss, which will be offset once the redeveloped Stadium is complete.	Negative	Local community	Almost certain	Minimal	Moderate (A1)
Existing buildings & facilities					
Alongside the SFS structure, a number of other buildings within the immediate site context are also proposed for demolition including the Sheridan Centre Building, Cricket Australia HQ, Sydney Roosters HQ, the stadium store, tennis courts and the stadium club. Demolition of these buildings will require re-location of some businesses and organisations to alternative locations.	Negative	Existing tenants	Almost certain	Significant	High (A4)
The NRL Headquarters and the Rugby Australia Building (UTS Building) will be retained during the demolition and redevelopment process. The buildings are expected to continue operating during the demolition and construction phase. A number of amenity and operational impacts will be experienced by the users and occupants of this building during demolition.	Negative	Existing tenants	Almost certain	Significant	High (A4)
The SFS also contains a number of SCG Trust member facilities including a club house, gymnasium, tennis courts, function centre and swimming pool. The use of these facilities is for members only and not available for general public use. Significant impacts to the users of these facilities will be experienced during the construction process however impacts to the general public are unlikely.	Negative	Stadium users	Almost certain	Moderate	High (A3)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
The MP1 car park will be out of operation during the demolition and construction phase, however is proposed to be reinstated as part of the redevelopment of the SFS. The MP1 car park is also used by members attending SCG events who will not be able to access the car park during the demolition and construction phase.	Negative	Stadium users	Almost certain	Moderate	High (A3)
Property protection					
It is not anticipated that any direct physical impacts to adjoining or nearby properties will be experienced during the demolition and construction period. Standard mitigation measures will be employed to ensure that appropriate actions are implemented to protect surrounding properties.	Neutral	N/A	N/A	N/A	N/A
Summary					
The NRL and Rugby Australia buildings are proposed for retention and will remain operational during the demolition of the SFS. SCG Trust Member facilities will be relocated during the demolition, requiring members to access alternative locations throughout the demolition and construction period. The overall impacts to the built environment have been assessed as negative, however it is noted the impacts are temporary in nature. Upon completion of the redevelopment, it is expected that the new stadium will enhance the surrounding public domain and existing built form.					
Recommended mitigation measures					
Mitigation measures should be implemented to reduce impacts to existing buildings and facilities as outlined in the Construction Management Plan (prepared by Aver 2018). A summary of these recommendations includes:					
<ul style="list-style-type: none"> Establish protection zones around existing buildings proposed to be retained should be established to ensure that demolition and construction activities do not impact the structural integrity of these buildings. Establish tree protection zones around existing trees proposed for retention including trunk protection and fencing as outlined in the Arboricultural Impact Assessment (Tree IQ, May 2018). Retain clear access to the NRL and Rugby Australia buildings at all times and install site fencing to clearly delineate the Stage 1 demolition zone around each building. Adequate protective perimeter signage will be maintained if already on site and installed if required. This signage will be required to identify construction works in progress and ensure no unauthorised entry to site. Vehicular access/egress gates are proposed off Moore Park Road into Paddington Land and Driver Avenue and these gates should be manned by qualified traffic supervisors at the times of major vehicular access and egress to the Site. Review these public and property protection measures at the time of commencing the Works to ensure alignment with proposed preferred methodologies and sequencing developments and to ensure that the safety of the general public is maintained at all times during the Works. 					

6.2.4 Community

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Community networks					
With respect to the existing users (tenants) of the stadium, there will be disruption to scheduled events, training sessions and operations of business/commercial premises. Many of the existing fixtures will be relocated to the SCG during the demolition and construction phase. A select number of fixtures will also be held at alternative venues. There will be positive and negative social impacts associated with the relocation of existing sporting clubs, with the relocated fixtures to other venues being advantageous for some social groups and disadvantageous for others.	Positive/ Negative	Existing tenants	Almost certain	Minor	Moderate (A3)
For patrons and fans attending sporting matches, there will also be social impacts associated with the temporary loss of a Tier 1 stadium facility. Established traditions such as family outings, community gatherings and organised group excursions to sporting events at the stadium will be impacted in the short term. It is anticipated however that many of the scheduled sporting fixtures will be transferred to the SCG, which will assist with mitigating any potential impacts. Whilst the location is within proximity to the SFS, the visitor experience will be different due to the size and scale of the venue and the seating arrangement.	Positive/ Negative	Spectators	Almost certain	Minor	Moderate (A2)
The relocation of existing members facilities contained within the demolition area will have social impacts for SCG Trust members. Alternative arrangements will be required for the duration of the demolition and construction; however, this may result in the dispersion of members across a range of locations, or at the least result in an inconvenience to existing members due to a loss of their preferred seating location.	Negative	SCG Trust Members	Almost certain	Minor	Moderate (A2)
Public health & wellbeing					
The temporary loss of a Tier 1 stadium within an established sporting precinct may have tangible and non-tangible temporary impacts on the general public's health and wellbeing. The likely impacts associated with this temporary loss include; the re-distribution of sporting events to other locations around Sydney and the impacts on these locations (both positive and negative) in accommodating these events; the change in spectator experience due to the relocation of professional sporting events to other venues; the non-tangible health and wellbeing impacts associated with viewing and experiencing live and professional sports events at a Tier 1 stadium.	Negative	Greater Sydney Community	Almost certain	Moderate	Moderate (A3)
Reduced patrons to the precinct as a result of the demolition will also have direct and indirect health and wellbeing impacts including: <ul style="list-style-type: none"> the loss of vibrancy and social connections within and around the precinct, especially on weekends; the loss/reduction of activity and activation along key high streets (i.e. Crown Street and Oxford Street); 	Negative	Greater Sydney Community	Likely	Minor	Moderate (B2)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
<ul style="list-style-type: none"> the loss of employment opportunities (e.g. service industry) associated with the operation of the stadium; direct and indirect impacts to local business, land owners and tenants. 					
Safety					
Moore Park is an expansive precinct dissected by arterial roads and impermeable pedestrian barriers. During non-event days, the SFS and the SCG are relatively inactive pedestrian environments with minimal ground floor activation and passive surveillance opportunities. Due to the site's isolated nature, there is potential for increased crime and anti-social behaviour (including loitering, graffiti and vandalism) within and around the demolition and construction site associated with the required site exclusion, hoarding and fencing structures that will be erected. It is expected that these impacts can be managed through appropriate mitigation measures and construction management plans.	Negative	Local community	Possible	Minor	Low (C2)
Employment & local economy					
Although the SFS will be out of operation for three years, its redevelopment and construction will attract an array of new jobs and employment opportunities. The social benefits associated with the integration of on-site workers within surrounding neighbourhoods will contribute to offsetting the loss from patrons on event days.	Positive	Local businesses Construction workers	Almost certain	Minimal	Moderate (A1)
During the demolition and construction of the stadium, there will be direct and indirect impacts to surrounding local businesses, particularly those within the service and hospitality industries. It is noted the SCG will continue to operate and host events during the demolition and construction of the SFS so local business 'flow-on' effects will still be maintained, albeit slightly reduced. After the completion of the new SFS, the redevelopment is expected to attract larger on-average crowds per event which will increase contributions of local business.	Neutral	Local businesses	N/A	N/A	N/A
Broader temporary impacts will be experienced in the tourism and accommodation sectors in relation to interstate and overseas visitors, particularly associated with major events and grand finals. These impacts are further quantified in the economic impact assessment.	Negative	Local businesses Greater Sydney community	Likely	Minor	Moderate (B2)
Infrastructure and services					
It is not expected that there will be any direct impacts that can't be managed/mitigated in relation to water, gas and electricity services within the immediate and broader locality.	Neutral	N/A	N/A	N/A	N/A

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Summary					
The demolition of the SFS will have a range of varied impacts across different communities and groups. During the demolition, the majority of sporting fixtures will be transferred across to the SCG, providing a different visitor experience to spectators. The implications associated with the rescheduling of events will have both negative and positive social impacts for different user groups.					
Recommended mitigation measures					
Mitigation measures should be implemented to reduce impacts to the local community including adjoining land owners, residents and businesses. Where possible, mitigation measures outlined in the Construction Management Plan (prepared by Aver 2018) should be implemented. A summary of these recommendations is provided below.					
<ul style="list-style-type: none"> • Develop a site-specific Plan that considers cover induction and training, safe work method statements (SWMS), risk management, injury management, incident management, training, inspections, audits and performance reporting. • Prepare a Crime Risk Assessment that addresses mitigation strategies to reduce and minimise instances of crime or anti-social behaviour. • Develop exclusion zones and restricted areas to ensure no unauthorised persons are able to access the demolition and work area. • Outside of working hours (or when the site is otherwise unoccupied), B Class Hoarding or other measures are to be erected/ installed to restrict public access to the site and building works, materials and equipment. • Signs to be erected in clearly identifiable positions stating that unauthorised entry to the site is not permitted. The signs are to include an after-hours contact name and telephone number. 					

6.2.5 Cultural & heritage values

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Aboriginal deposits					
The potential for deposits beneath the site has been recently demonstrated through the recent construction works associated with the Sydney Light Rail. There may be opportunities during the demolition and site preparation works to uncover further archaeological deposits beneath the SFS profile that could further contribute to understanding the history of the site.	Positive	Greater Sydney community	Possible	Moderate	Moderate (C3)
Intrinsic heritage significance					
The SFS site has intrinsic heritage significance relating to its function, form and positioning as a major sports stadium. The stadium is a non-contributory building and its demolition relates only to the modern fabric and materiality. As assessed within the Heritage Impact Statement (Curio Projects, 2018b), no physical impacts to the heritage fabric of the Moore Park HCA will occur as a result of the demolition.	Positive	Greater Sydney community	Almost certain	Significant	High (A4)
Busby's Bore					
There is potential for impacts to the State significant Busby's Bore during the demolition and construction period. The Bore is an important cultural heritage item located beneath the subject site and is also listed on Sydney Water's Heritage Conservation Register. There are five well shafts located within or immediately adjacent to the SFS redevelopment area SFS, however the precise alignment of the Bore and the location of some of the shafts are unknown, presenting a minor level of risk during the demolition process.	Negative	Greater Sydney community	Possible	Minimal	Very Low (C1)
Impact of site excavation					
Moore Park is home to the traditional lands of the Gadigal people and whilst there is little ethnographic record prior to the arrival of colonists in the late 1700's, it is estimated that at least 1,500 Aboriginal people lived within the coastal region between Broken Bay and Botany Bay. Given the lack of existing records, there is potential for aboriginal archaeological remains to be present within the site. As excavation below ground level is not proposed during Stage 1 demolition there is no potential for archaeological remains to be damaged or removed during the demolition (Curio Projects, 2018a).	Neutral	N/A	N/A	N/A	N/A
Aboriginal cultural values					
The proposed demolition provides an opportunity to reveal and discover more about the site and surrounds, its heritage associated with potential relics and archaeological significance including an assessment of aboriginal cultural values and engagement with traditional owners of the land to determine the non-tangible values that are embodied with the site.	Neutral	N/A	N/A	N/A	N/A
Summary					
The demolition of the SFS may present opportunities to understand and uncover more information about the land's indigenous heritage. Physical risks and damage to heritage items, specifically Busby's Bore, has the potential to result in negative impacts however these can be mitigated through careful site preparation and demolition management. The demolition of the stadium remains consistent with the social and cultural heritage of the site associated with public sport and recreation.					

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Recommended mitigation measures					
Mitigation measures should be implemented to reduce impacts to the site's heritage and cultural values as outlined in the Heritage Impact Statement, Archaeological Assessment (both prepared by Curio Projects, 2018) and the Construction Management Plan (prepared by Aver 2018). A summary of these recommendations is provided below.					
<ul style="list-style-type: none"> Detailed design works, and Stage 1 Early Works should ensure measures are taken to identify the location of Busby's Bore within the subject site (where possible), and avoid physical impact to the State heritage listed item, where possible. Protection zones should be established around known Busby's Bore shafts (Shafts 9 and 10) within the SFS site during all stages of development works (including Stage 1 demolition to hard stand), including a subsurface buffer to avoid subsurface disturbance to the path of Busby's Bore as it passes under the northern side of the subject site. An attempt should be made to accurately locate and survey Shaft 11 and Intervening Shaft No. 4 of Busby's Bore (and the path of the Bore itself across the subject site, if possible) to ensure location is known, and protection zones can be established during all stages of site development works (i.e. demolition and site preparation). Should ground disturbing works in the vicinity of Busby's Bore tunnel and/or shafts, the former Engineers Depot or Sydney Sports Ground be required prior to approval of the SSD, appropriate approvals should be sought prior to ground disturbing works. A Historical Archaeological Research Design (ARD) should be prepared to mitigate the impact to, and guide development in proximity to potential historical archaeological resources, notably Busby's Bore, and potential archaeological remains associated with the former Engineers Depot. Where possible, development impacts within natural soil profiles should be minimized as much as practicable to limit the impact to potential Aboriginal archaeological deposits. Lower impact construction techniques such as piling should be considered for the development where possible. Archaeological Technical Report (ATR), including proposed Aboriginal archaeological mitigative strategies, to be developed in consultation with the Aboriginal community (in accordance with OEH guideline Guide to Investigating, assessing and reporting on Aboriginal Cultural Heritage in NSW) A revised Archaeological Assessment should be prepared once the Stage 2 design has been completed and details of the development impacts across the site are known, that reassesses the impacts that the development may have on potential historical archaeological resources and presents mitigative strategies where appropriate. A Heritage Interpretation Strategy should be prepared for the SFS Redevelopment site, in collaboration with the Stage 2 detailed design, to publicly present the history and cultural significance of the SFS site, including Aboriginal archaeological and cultural heritage significance, historical archaeological significance, as well as the site in its wider significant built heritage and cultural heritage setting. The identified potential heritage impacts as presented through this HIS (i.e. in relation to the Concept Proposal), should be considered through the Stage 2 detailed design and development of construction plan and proposed ground impacts for the new stadium. 					

6.2.6 Environmental and biodiversity

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Native vegetation					
There will be no indirect impacts on native vegetation or habitat resulting from the project. The construction and operation of the project is restricted to a discreet area and there are no adjoining areas of native vegetation beyond the development site that would be impacted.	Neutral	N/A	N/A	N/A	N/A
Endangered and threatened species					
There are a number of threatened species that are known to have habitat within the surrounding area as classified by the <i>EPBC Act 1999</i> , however it has been assessed that the habitats have been highly disturbed and there are not natural habitats present. Whilst demolition of the stadium won't directly impact threatened species, there will be some impacts on the natural environment around the stadium site (Jacobs, 2018).	Neutral	N/A	N/A	N/A	N/A
Eastern Bentwing bat					
The development site contains human made structures including the existing SFS. The candidate threatened species for the project that may utilise human made structures is the Eastern Bentwing-bat. This species is likely to forage on insects attracted to the lights of the SFS and surrounding buildings and car parks however is considered to have a low likelihood of using the SFS as a roosting site. In a bioregional context, the SFS is not an important habitat for the Eastern Bentwing-bat. The predicted consequences of the proposal on the local and bioregional persistence of the Eastern Bentwing-bat are negligible (Jacobs, 2018).	Neutral	N/A	N/A	N/A	N/A
Habitat regions					
The development site is located within a highly urbanised and disturbed landscape where the majority of habitats have been cleared. The habitats that do remain are fragmented and highly isolated. Planted urban vegetation does provide a role in facilitating the movement of threatened species across the landscape, however, there is no obvious physical habitat connectivity associated with the development site.	Neutral	N/A	N/A	N/A	N/A
No barriers to movement will be introduced and no further fragmentation of habitats will occur. The development site is not part of a recognised movement corridor between breeding grounds, foraging grounds, or other habitats important for the lifecycle of species such as staging points for migration. Mitigation is not required as there will be negligible impact to the bioregional persistence of threatened species that currently benefit from the limited connectivity in the locality (Jacobs, 2018).	Neutral	N/A	N/A	N/A	N/A
Flooding & water					
The existing site is subject to flooding, as a function of its position on an overland flow path for surface water flowing from Moore Park Road to the north and Driver Avenue to the South West. Flood modelling indicates that there is a risk overland flows will eventuate during minor storms and major storms alike in the existing conditions. This surface water tends to collect at a trapped	Neutral	N/A	N/A	N/A	N/A

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
low point on Driver Avenue. A stormwater and Flooding Assessment (Arup, 2018d) has found that the demolition and construction of the stadium can be undertaken without any adverse impacts to the surrounding area.					
The existing site has a Sydney Water stormwater drainage asset situated to the north and west of the existing stadium and crossing through the site. This drain carries water from the suburb of Paddington and surface water from Moore Park Road to the Sydney Water main drain below Driver Avenue. The Sydney Water infrastructure on the site will be impacted by the proposed stadium footprint, requiring the installation of a diversion system. It is considered that will have minimal bearing on any social impacts.	Neutral	N/A	N/A	N/A	N/A
Summary					
The SFS is a heavily modified and 'disturbed' site with little native vegetation or ecological significance. The demolition of the stadium is not expected to have any significant impacts on the ecological, biodiversity or native flora/fauna habitats. Although the impacts to the environmental and biological values have been assessed as neutral, there are opportunities for the redevelopment of the site to enhance the ecological values through public domain improvements and landscaping.					
Recommended mitigation measures					
Mitigation measures should be implemented to reduce impacts to existing biodiversity and environmental values within and around the site as outlined in the Biodiversity Development Assessment Report (prepared by Jacobs, 2018) and the Arboricultural Impact Assessment (prepared by TreelQ, 2018). A summary of these recommendations is provided below.					
<ul style="list-style-type: none"> Any trees identified for protection during construction are to be marked on ground and on any approved demolition plans. Temporary fencing should be erected to protect trees that are to be retained. A minimum 1.8m high chain-wire fence is to be erected at least three (3) metres from the base of each tree and kept in place prior to works commencing. All required tree protection measures are to be maintained in good condition for the duration of the construction period. All areas within the root protection zone are to be mulched with composted leaf mulch to a depth of not less than 100mm. A sign is to be erected indicating the trees to be protected. The installation of services within the root protection zone is not to be undertaken without prior consent from the consent authority. All personnel involved with the development are to ensure no excavation occurs within the Tree Root Zones of any tree to be retained. Driveways required for construction must be located sufficiently clear of street trees. A method of clearing that avoids damage to retained vegetation should be used. For example, removal of vegetation in small portions with the aid of an elevated work platform is preferable to felling entire trees. Allow any fauna to leave an area without intervention as much as possible. Sediment barriers to control the quality of water released from the site Staff training and site briefing should include an overview of the site's environmental features and the measures required ensure their protection. Divert the storm water main around the northern and western sides of the stadium, beneath the external circulation area. The diversion would be between the entry point to the site at Moore Park Road to the Rugby League Central building. The length of the diversion would be approximately 220m. 					

6.2.7 Traffic and transport

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Hours and duration					
<p>It is anticipated that standard construction hours would apply during the demolitions works (Aver, 2018). In some instances, there may be a requirement for extended hours including early morning and evening work. The standard construction hours that are typically applied to development and which would be used for the proposed demolition works are as follows:</p> <ul style="list-style-type: none"> Weekdays 7:00am to 6:00pm Saturdays 8:00am to 1:00pm Sunday and public holidays: no work <p>The extent of work to be conducted on days with events held at the SCG may be reduced to manage the movement and safety of pedestrians in the precinct. Construction workers generally start and finish work earlier, beyond the typical office hours and therefore unlikely to coincide with the site's peak periods.</p>	Negative	Local community Tenant community	Almost certain	Minimal	Moderate (A1)
Heavy vehicles					
It is expected up to five (5) construction vehicles will access the site per day during the procurement and establishment period. During the ancillary stadium demolition works period, this number is expected to increase between the range of 30 – 40 vehicles per day. Given the closure of the MP1 car park, it has been assessed that the volume of traffic in and out of the stadium precinct would be less than the existing members accessing the MP1 car park.	Neutral	N/A	N/A	N/A	N/A
Worker vehicles					
Overall traffic movements are not expected to be above current levels as worker traffic will be offset by the closure of MP1 car park during demolition. Construction workers generally start and finish work earlier, beyond the typical office hours and therefore unlikely to coincide with the site's peak periods. Worker parking will be managed as per the CMP and TIA.	Neutral	N/A	N/A	N/A	N/A
Construction routes and traffic network					
The primary construction access routes will be via the State road network including the Eastern Distributor and City Cross tunnel. The likely inbound and outbound routes will be around the perimeter of the site i.e. Moore Park Road, Driver Avenue and Paddington Lane. Due to existing traffic conditions, access into the site will only be via Moore Park Road. It is likely residents located along the primary construction routes may experience reduced amenity associated with increased volumes of heavy vehicles (noting the low vehicle movement numbers during the demolition phase). It is noted that the level of activity and impact from construction traffic will be partially offset by the existing traffic flows to the site, much of which will be removed from the site during the demolition and construction phase.	Negative	Local community Greater Sydney community	Almost certain	Minor	Moderate (A2)
Public Transport					

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
The site is well serviced by public transport and it is not expected that public transport services will be affected by the demolition and construction period. The expected opening of the Sydney Light Rail in 2019 overlaps with the construction period and will provide additional transport options for workers to access the site and further reduce the dependency on motor vehicles.	Neutral	N/A	N/A	N/A	N/A

Summary

Traffic and transport impacts are expected to be minimal during the demolition of the SFS. Although there will be slightly increased construction vehicles accessing the site, it has been assessed that the total increase and volume of traffic arriving and departing the stadium will be less than existing conditions (due to the closure of MP1 during demolition).

Recommended mitigation measures

Mitigation measures should be implemented to reduce the traffic and transport impacts within and around the site associated with the demolition of the stadium. Relevant mitigation measures are outlined in the Traffic and Transport Assessment Report (prepared by Arup, 2018c) and the Construction Management Plan (prepared by Aver 2018). A summary of these recommendations is provided below.

- All trucks will be loaded to their prescribed weight limits, within the site boundary and be covered with a tarp (rubbish loads only) prior to exiting the Site.
- All trucks are to be held within the construction site for the demolition works, with no queueing on public roads to occur.
- Construction workers / tradespersons will be encouraged to utilise public transport and/or car pool with other construction workers.
- All demolition vehicles are to be contained wholly within the site and vehicles must enter the site before stopping. A construction zone will not be permitted on surrounding public roads.
- Hours of operation are Mondays to Friday 7:00am to 6:00pm and 8:00am to 1:00pm Saturday. No Works on Sundays and Public Holidays and materials would be delivered and spoil removed during standard construction hours
- Establishment and enforcement of appropriate on-site vehicle speed limits (20km/h), which would be reviewed depending on weather conditions or safety requirements;
- Neighbouring properties would be notified of construction Works and timing;
- No vehicles will queue on public roadways including Moore Park Road
- Deliveries would be planned to ensure a consistent and minimal number of trucks arriving at site at any one time.
- Vehicles would arrive to the site in a staged manner that will prevent the need for queuing outside the site
- All deliveries are to be pre booked;
- All deliveries are to check in at the site office;
- Drivers are to give way to pedestrians.

6.3 Operational impacts

An assessment of the social impacts relating to the ongoing operation of the stadium is provided in this chapter.

The State Significant Development Application submitted to the Department of Planning and Environment seeks approval for a concept proposal and demolition only of the Sydney Football Stadium at this stage. The final design of the future Stadium is yet to be determined, whilst this is the case, for completeness it is important that any assessment of the social impacts of the project consider and evaluate the potential impacts of the proposed development once operational. Taking this into consideration, the following topics and themes are evaluated:

- Visitor Experience
- Capacity and attendance
- Community
- Noise and vibration
- Transport and accessibility

6.3.1 Visitor Experience

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
All weather seating					
The introduction of all-weather seating across all tiers of the stadium will significantly enhance the visitor experience and will provide a more equal experience across the various ticket price points. With greatly enhanced amenity for the typical patron, the introduction of full roof coverage is expected to be a foundation for increased visitor attendance. All weather seating is likely to have social benefits for low to middle income households by increasing the number of seats with optimal amenity, thereby providing more access to high amenity seating for households without sporting club membership.	Positive	Stadium users and tenants	Almost certain	Moderate	High (A3)
The inclusion of weather protection and a roof may also entice other prospective spectators, such as families with children and the elderly, to attend matches who may ordinarily choose to watch from within their houses (or at an alternative venue).	Positive	Stadium users	Almost certain	Significant	High (A4)
The inclusion of a roof will provide greater flexibility for the venue to accommodate a wider variety of events and concerts (non-sport related). This will provide certainty to future venue hirers and improve the operational capacity of the stadium.	Positive	Stadium users	Almost certain	Moderate	High (A3)
Improved entry and exit					
There is currently limited public access into the precinct with the area directly around the stadium only accessible in event days. On event days, it has been assessed that pedestrian permeability, access and connectivity around the site is restricted due to road barriers, long lines of fences and	Positive	Stadium tenants	Almost certain	Moderate	High (A3)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
an impermeable public realm. The proposed stadium will improve pedestrian movement on event days by removing existing barriers to accessibility whilst also providing dedicated entrances for staff, media and general admission including improved access and circulation within and around the ground.		Stadium users and tenants			
Congregation areas					
Currently, due to the layout and design of the concourse area and the lack of ground floor activation, the external perimeter of the stadium does not facilitate opportunities for social interaction. The redevelopment will incorporate features that provide spaces for people to meet and gather before events, also distributing the patronage across a longer period of time and reducing the peak queuing times.	Positive	Stadium users and tenants	Almost certain	Significant	High (A4)
Corporate facilities					
Delivery of premium seating areas and corporate boxes will provide direct amenity benefits for upper income households, but these assets provide a necessary service to draw interstate tourism. This feature has been evident in the Etihad Stadium (Melbourne) and the redeveloped grandstand at the Adelaide Oval, both of which provided a very clear and pronounced attraction of interstate tourists.	Positive	Stadium users and tenants	Almost certain	Moderate	High (A3)
Food and beverage offerings					
A wider variety of food and beverage outlets will be incorporated into the new stadium which will provide a greater offering and diversity of choice. Outlets will cater for a variety of different functions including 'grab and go' and table service options. This improved offering will improve the overall patron experience at events.	Positive	Stadium users and tenants	Likely	Moderate	Moderate (B3)
Linkages to historic and heritage values					
There are strong social and cultural linkages with the site and its historic association with sporting and recreational uses. Redevelopment of the stadium will encourage and secure the ongoing long-term use of the site for sporting and cultural activities. Enhancing the linkages to the cultural heritage through interpretation and contemporary expression, may contribute to increasing the social accessibility and cultural awareness of the stadium and the site's history, beyond that of a singular sporting destination.	Positive	Stadium users and tenants Greater Sydney Community	Possible	Minor	Low (C2)
Social equity					
The proposed redevelopment of the stadium will improve the existing public amenities including the provision of a sufficient number and quality of female facilities and disabled/accessible facilities. In addition to these amenities, other facilities such as parenting rooms, child-friendly spaces and prayer rooms will be incorporated into the design to ensure the new stadium caters for the diverse needs of all members of society.	Positive	Stadium users and tenants	Almost certain	Moderate	High (A3)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Sustainability					
It is expected the stadium will adopt a LEED Gold rating, representing Australian best practice. LEED is a holistic sustainable building rating scheme administered by the United States Green Building Council that considers sustainability from the inception of construction through to life-cycle (Aurecon, 2018a).	Positive	Stadium users and tenants	Almost certain	Moderate	High (A3)
There are significant opportunities to improve the overall sustainability and energy consumption of the new stadium. Increased energy efficiency will reduce the overall life-cycle costs associated with the daily operation of the stadium. Although detailed design of the stadium is subject to a future detailed DA process, it is expected that the stadium will significantly improve energy efficiencies relating to materials, recycling, transport, water and solar power capabilities.	Positive	Stadium users and tenants	Almost certain	Moderate	High (A3)
Leverage from improved transport efficiency					
The SFS is close to the CBD so provides adequate amenity for office workers (walking). The overall quality of public transport access from Greater Sydney is relatively poor (especially less frequent services after peak hour) but will be improved with the arrival of Light Rail in 2019 and the Sydney Metro.	Positive	Stadium users and tenants	Almost certain	Major	High (A5)
Improved security					
At present existing security arrangements restrict the flow of visitors into the stadium resulting in lost time between the moment of arrival and entrance upon into the stadium. 70% of people arrive in the hour prior to the event starting. Currently the SFS has two primary access points on the northern and western side of the stadium. As part of a future new stadium it is intended to provide improved access arrangements through a redesigned concourse area and enhanced public entrances that will ensure that patrons can move easily within the stadium whilst also enhancing the stadium's defensive capabilities.	Positive	Stadium users and tenants	Likely	Significant	High (B4)
Lighting					
At present inconsistent lighting within and around SFS results in poor visibility and reduced passive surveillance. Key pedestrian routes including Foveaux Street, Tibby Cotter Bridge and More Park West are poorly lit and lack of lighting consistency results in reduced visitation and utilisation of public spaces. Improved and consistent lighting within and around the stadium will be a key feature of the improved stadium and will help with maximising sightlines, amenity and opportunities for passive surveillance.	Positive	Stadium users and tenants Local Community	Likely	Moderate	Moderate (B3)
Pedestrian experience					
Under the existing arrangement there are currently multiple pedestrian and vehicle conflict points around the stadium that create road hazards and pedestrian safety issues. On event days, these locations experience heavy pedestrian traffic which banks up across the road. There are no formal pedestrian crossings along Driver Avenue and the condition of the road is inconsistent. Future redevelopment of the stadium will provide the opportunity to deliver a public realm that is	Positive	Stadium users and tenants Local Community	Possible	Moderate	Moderate (C3)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
more effective at distributing pedestrian flows throughout the site, reducing congestion at key intersections and minimising potential pedestrian and vehicular conflicts.					
Summary					
The overall social impacts relating to visitor experience have been assessed as positive. The social benefits from the improved facilities will primarily benefit stadium users, tenants and members and the redevelopment will significantly enhance visitor amenity across a range of operational, social and cultural experiences. Of significant influence is the inclusion of a new roof which will provide 100% drip line coverage, improving weather protection for patrons. The new design will also allow for improved efficiencies including better circulation spaces, lighting and membership upgrades.					

6.3.2 Capacity and attendance

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Improved experience for general admission					
The new Sydney Football Stadium may be constructed with the potential to operate in two modes when hosting events; championship mode and club mode. When in championship mode, all three seating tiers, upper, mid and lower tier seats, would be available, with a combined capacity of up to 45,000. When in club mode, the upper tier seating would not be open to the public, lowering the capacity of the stadium to 30,000. Seating will be reconfigured to provide positions closer the playing field, and an increase in the premium seating.	Positive	Stadium users and tenants	Almost certain	Minimal	Moderate (A1)
The existing barriers for pedestrians to get to and from the site result in increased in the time take to get to and from the site. The redeveloped stadium will improve pedestrian movement and permeability throughout the stadium and concourse areas and reduce the time required to enter and exit the stadium ground, thus providing a more pleasant and streamlined experience for patrons.	Positive	Stadium users and tenants	Almost certain	Moderate	High (A1)
Flexibility of venue					
There are currently only two underground change rooms, which prevent double-header events and are inferior quality facilities for professional sports, in particular for female professional sports. It is intended that a future stadium will provide state of the art amenities for all athletes and entertainers.	Positive	Stadium users and tenants	Likely	Moderate	Moderate (B3)
A new stadium will also provide an extensive new 'back of house' area, providing for more room for vehicles and audio-visual equipment. The expanded back of house will greatly improve the productivity of underground spaces and are particularly important for delivery of music events.					

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Patronage and club membership trends					
The proposed new stadium will provide all weather seating to 100% of seats. This combined with improved seats, facilities, amenities and greater accessibility will make for a superior customer/patron experience when attending events at the stadium. Provision of more equal seating amenity (all weather coverage) is expected to generate a more equitable distribution of attendance across all households and will result in increased overall patronage and possibly higher levels of club membership. This outcome would result in a positive social impact for many lower income households as professional sports and entertainment becomes a more accessible and viable option.	Positive	Stadium users and tenants	Likely	Moderate	Moderate (B3)
SCG Trust membership					
There will be no increase in car parking for SCG Trust members. Redevelopment of the SCG Trust facilities form part of the construction costs, with some cost recovery to be achieved through more widespread membership and ingoing member fees.	Neutral	N/A	N/A	N/A	N/A
Summary					
The overall social impacts relating to capacity and attendance have been assessed as positive. Enhanced flexibility of the venue will be a significant social benefit for stadium users and tenants and the inclusion of a new roof will provide more flexibility for the stadium to accommodate other non-sporting related events. Although the total capacity of the stadium will not increase, the provision of more facilities that are commensurate to the number of spectators will allow for more streamlined visitor experiences. More efficient back of house and service areas will further improve the operational efficiency of the stadium.					

6.3.3 Community

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Public health and wellbeing					
The proposed new stadium is expected to support an improved patron experience, increased crowd attendance whilst also being more family friendly. This is expected to translate into a greater number of people, and in particular children and youth, attending events and being inspired to participate in active sports such as soccer, rugby, rugby league etc. In this regard the proposed stadium will encourage sports participation at junior levels and improve the overall public health and well being of the Sydney community.	Positive	Stadium users and tenants Greater Sydney community	Likely	Minor	Moderate (B2)
Community networks					
Through its ability to host a larger number of events in all weather conditions, the proposed stadium will facilitate the coming together of community networks (e.g. sporting communities and associations, fan groups etc.) on a more regular basis.	Positive	Stadium users	Almost certain	Minor	Moderate (A2)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Community needs					
The proposed stadium is being designed to provide a 100% all weather seating solution and, in this regard, will respond to the communities needs for stadia to be able to host events in all weather conditions.	Positive	Stadium users	Almost certain	Minor	Moderate (A2)
Safety					
Some of the primary reasons for the proposed redesigned stadium is to improve territorial reinforcement, increase opportunities for surveillance and monitoring, improving fire safety compliance, improving the and design quality emergency exit points, improving disabled access, and improving overall safety for patrons of the venue. The proposed stadium will therefore deliver a number of safety benefits for users of the stadium.	Positive	Stadium users	Almost certain	Moderate	High (A3)
Value of place					
The proposed stadium will be designed to be a state of the art Tier 1 facility. A key focus of the future design will be on improving the stadium's relationship with its surrounds and improving its contribution to the character and value of the Sydney sporting grounds complex and broader neighbourhood. The new stadium is therefore expected to make a positive contribution to the quality of place within the local area.	Positive	Greater Sydney community	Likely	Moderate	Moderate (B3)
Employment					
The Sydney Football Stadium Redevelopment project will generate both temporary and permanent new jobs for Sydney. Approximately 600 temporary jobs will be created during the 3-year demolition and construction phase. Once complete the stadium will support 292 full time equivalent direct jobs and will approximately 346 indirect jobs in the local area. It is also anticipated to generate additional jobs in accommodation services.	Positive	Local businesses	Likely	Moderate	Moderate (B3)
Local Economy					
Anticipated increased crowd attendance because of the proposed new stadium will help support a growing local economy, including improved opportunities for local businesses and improved tourist and visitor accommodation opportunities. This will in turn contribute to local job creation and greater expenditure in the local region.	Positive	Local businesses	Likely	Minor	Moderate (B2)
Summary					
The overall social impacts associated with community health and wellbeing have been assessed as positive. The scope of the positive impacts affects a broad range of groups including the immediate stadium users, the local community, adjoining businesses and the Greater Sydney Community.					

6.3.4 Noise and vibration

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Operational noise					
Operational noise emissions from the SFS have been assessed by Arup (2018b) in accordance with relevant guidelines. Operation noise considers noise emitted from external mechanical plant and equipment, staff car parking activities, loading and unloading, waste and recycling collection. The future new stadium on site is expected to have a seating capacity consistent with that of the existing. The new stadium will likely hold a greater number of events in a calendar year, with increased levels of attendance, whilst this is the case the level and nature of noise impacts arising during operation will be largely similar to that of the existing stadium. For this reason a proposed future stadium on the site is not expected to result in impacts that are significantly above those which are already generated by SFS.	Neutral	N/A	N/A	N/A	N/A
The Noise Impact Assessment undertaken by Arup (2018b) concludes that there will be no increases to current noise impacts as a result of the SFS redevelopment, and that a slight reduction in overall noise impacts from events may occur.	Neutral	N/A	N/A	N/A	N/A
Sporting events					
Based on a full capacity scenario (i.e. 45,000 spectators) an assessment of the event noise from the proposed SFS has been undertaken. It is to be noted the SFS is subject to the <i>Sydney Cricket Ground and Noise Management Plan</i> (2017) which limits the noise from sound amplification systems and speakers. It is expected that between 49-52 events will be held at the stadium throughout the year, with the potential for additional events to be added throughout the year (e.g. AFL X and other women's competitions).	Positive	Local community	Likely	Moderate	Moderate (B3)
The Noise and Vibration Impact Assessment (May 2018b) The predicted that noise levels associated with sporting events at the SFS have identified there will be no increases to the current noise impacts. Changes to the shape of the stadium and the slightly reduced capacity contribute to a slight overall reduction in noise impacts from sport events.	Positive	Local community	Likely	Minor	Moderate (B2)
Concerts and events					
Up to six music events and concerts may be held at the stadium in a calendar year. The key determinant of potential noise impacts relates to the positioning of the speakers within the stadium. Depending on speaker arrangements within the stadium this could affect the level of noise impact is high on acoustic impact on residential properties directly adjacent to the Stadium along Moore Park Road and to the east of Poate Road	Negative	Local community	Possible	Minor	Low (C2)
Noise receivers comply when speakers are faced at the northern end facing south (typical arrangement for concert events). If alternative speaker arrangements are to occur such as centre or facing north, a sound desk operator may need to calibrate and control noise levels.	Neutral	N/A	N/A	N/A	N/A
Less common speaker arrangements within the stadium may impact surrounding noise receivers however this can be calibrated by a sound desk operator. Residences along Moore Park to the North and North east in Paddington are most impacted by potential noise exceedances.	Neutral	N/A	N/A	N/A	N/A

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Overall noise environment					
No increases to the existing noise impacts are predicted as a result of the SFS redevelopment, and a slight reduction in overall noise impacts from events may occur (Arup, 2018b). It is noted the scenarios assessed within the acoustic models do not account for roof coverage and therefore are conservative.	Positive	Local community	Possible	Moderate	Moderate (C3)
Summary					
The noise and vibration impacts associated with the operation of the redeveloped stadium have been assessed as neutral. In some modelled scenarios, it has been assessed that there are instances where the overall noise environment may be slightly reduced from existing conditions.					
Recommended mitigation measures					
An assessment of any noise impacts associated with the construction and ongoing operation of the Stadium should be undertaken as part of the Stage 2 SSDA.					

6.3.5 Transport and accessibility

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Utilisation of Public Transport					
The CBD and South East light rail will offer significantly improved level of service for people travelling to SFS by public transport with between 9,000 and 14,000 passengers per hour can be accommodated on special event light rail services. This is a substantial increase from the existing bus network which has capacity for between 3,000-4,000 passengers per hour during peak times (Arup, 2018c).	Positive	Stadium users Local community Greater Sydney community	Almost certain	Significant	High (A4)
Servicing and Loading					
Paddington Lane is the only service access road running along the east side of the stadium and currently does not feature a rejection lane. This creates complications when unauthorised vehicles are required to be removed from the site. This lane is also shared by the SCG. As part of the redevelopment it is proposed to expand the road to include a rejection lane which will allow for unauthorised vehicles to exist the site without causing blockages or road congestion. This is particularly critical in peak loading/unloading times before and after events.	Positive	Stadium users Local tenants	Likely	Moderate	Moderate (B3)
The basement under the SCG will be retained, and a new and improved basement area to accommodate services and deliveries under the SFS is proposed. A small car parking area for 50 vehicles will also be included within the new basement.	Positive	Stadium tenants	Almost certain	Moderate	High (A3)
Vehicle access & car parking					
Driving has been assessed as the dominant mode of travel to SFS across each of the events surveyed; 47% rugby union, 43% rugby league and significantly higher at football with 66% of people surveyed arriving by car as a driver or passenger (Arup, 2018c). Car mode share was particularly high for the Sydney FC match due to the low attendance and opposition teams outside of Sydney. The proposed development will not include the provision of any new public parking facilities, and therefore parking will therefore remain consistent with the existing arrangement.	Neutral	Stadium users	N/A	N/A	N/A
Currently, non-sustainable transport behaviour is dominant with attendees. No additional parking will be provided and there will be a focus on promoting public transport, walking, cycling both for staff, players and spectators. A strong emphasis on travel information and educational material for the new SFS will ensure travel behaviour change. Taxi and Uber currently benefit from demand to get to and from SFS and a designated taxi/uber rank is proposed within proximity to the venue. The SFS redevelopment project does not propose to increase public car parking in the precinct therefore there will be no impact on increasing levels of traffic to the stadium.	Positive	Stadium users	Likely	Moderate	Moderate (B3)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Stadium access and circulation					
The arrival experience will be significantly enhanced under the proposal, with more space provided for both entry/egress as well as circulation. It is the intention the final design provides for greater permeability around the concourse area as well as within the surrounding public realm, allowing for improved pedestrian connectivity between Moore Park Road and Driver Avenue.	Positive	Stadium users	Almost certain	Significant	High (A4)
Pedestrian environment					
The walking network and experience from Central Station to the SFS via Devonshire Street will be significantly enhanced following the completion of the CBD and South East Light Rail in April 2019. The pedestrian environment will include improved wayfinding, a more activated and legible evening route, upgraded footpaths, reduced traffic and a new pedestrian bridge over South Dowling Street.	Positive	Stadium users Local community	Almost certain	Moderate	High (A3)
Other improvements to the pedestrian network around the Stadium will also be included as part of the redevelopment which will improve the ease and efficiency of patrons visiting and existing the stadium.	Positive	Stadium users Local community	Almost certain	Moderate	High (A3)
Cycling					
The SFS is already well connected by a number of local and regional cycle paths. Work is currently being undertaken to improve cycling (and walking) connections between Bondi Junction and the CBD, via the SFS/Moore Park area. Cycling access to the SFS will be enhanced in future through increased on-site bicycle parking, provision of end of trip facilities, better promotion of cycling facilities and improved wayfinding.	Positive	Stadium users	Almost certain	Moderate	High (A3)
Bus network					
To maintain a good level of access for people arriving by bus, the design has retained the existing event bus loop on the western side of Driver Avenue.	Neutral	N/A	N/A	N/A	N/A
With the completion of the light rail, a significant number of bus routes that travel between the Sydney CBD and Moore Park will be discontinued, allowing the services to be redirected. It is expected that the event shuttle bus that currently operates between Central Station and Moore Park will no longer operate and be fully replaced by the light rail.	Positive	Stadium users	Almost certain	Moderate	High (A3)
Road network					
It is envisaged there will be a reduction in the volume of traffic on the road network on event days due to the opening of the CBD and South East light rail and Metro rail service upgrades which will provide a higher level of service for people travelling to and from the SFS by public transport.	Positive	Local community	Likely	Moderate	Moderate (B3)

Comment	Pre-mitigation Impact	Affected Groups	Likelihood	Consequence	Significance Rating
Summary					
Social benefits arising from the redevelopment of the new stadium in relation to accessibility and movement are significant. In some instances, accessibility arrangements will remain largely unchanged such as the number of car parking spaces within MP1 and the existing bus services to the site. The redevelopment of the stadium will benefit from increased accessibility associated with the new light rail and other public domain upgrades.					

6.4 Supporting analysis for assessment of social impacts

At this time, the design specifications of a new stadium are yet to reach the planning process (in contrast to the Stage 1 DA which this report addresses). Notably, a final business case has been delivered, with a summary published in the public domain. It has reference to a design scope issued by the SCG Trust. The Final Business Case (2018) provides a preferred outcome (option 1, adjusted scope), and provides some core projections for impacts of the development.

There have been fundamental shifts in the distribution of spend on entertainment and recreation by Australian households over the past decade. These forces have worked to dampen attendances at stadiums in Sydney.

At the same time, subscriptions to pay TV services have become widespread, so that sports leisure time has become more concentrated within the family home, or in pubs and clubs.

Overseas flights have become much more affordable in Australian dollar terms. Trips to Thailand and Indonesia are most evident, with the domestic autumn and winter seasons enticing travellers. Consequently, considerable amounts of leisure spending is tending to drain away from the local economy.

These drivers have combined to force more scrutiny on the value proposition of attending a match at a sport stadium, by individuals and households.

Sydney Football Stadium has drawn solid trend growth in attendance, since operations began in 1988. Over the past thirty years, the trend annual growth in attendance has been 1.9%, which compares favourably with the NSW's population growth rate of 1.1%.

This stadium has been well used, with its city fringe location providing an equality of access that is the hallmark of popular stadiums worldwide. It has facilitated the emergence of the A-League as a prominent sporting code, with scope for more teams to emerge within Sydney as population growth continues into the future.

However, the recent past shows some challenges to the proposition of continued long-term trend growth in attendances. Recorded attendance for NRL games are now defined by Sydney Roosters home matches, which have levelled out at 15,000 to 16,000 per match.

Our analysis indicates that the limited rain coverage at the SFS would be a constraint on attendance. We show that the average rainfall for Sydney's autumn and winter seasons has trended higher over the past decade, which has most likely capped attendance at a stadium that provides less than adequate rainfall coverage.

The coincidence of flattening in attendance numbers with strong growth in team memberships is a significant fact. Our interpretation of this is that a seat rationing process has occurred, due to greater reliance on a handful of stadiums for sporting codes. Seating at the SFS and MCG are delineated by 'driplines' – some seats are under roof cover, and many seats are not, with the dripline providing a rough guide as to the separate spaces. The influence of seating coverage is important for the SFS, where only 55% of seats have this amenity.

Seating is subject to pre-release sales to team members well ahead of the game day or at the start of the season for some memberships, which provides a benefit for all matches because the probability of rain is not known so far in advance. Seats that are on the right side of the dripline have clear merit, and so memberships work to ration seating at large stadiums on the basis of potential weather impacts. Of course, the predictions of rain in the days preceding a match will also serve to influence attendance by non-members, given the nature of choosing seats that are either not covered, or are very remote from the field. Amenity for these potential patrons is diminished in one way or another.

Investment in roofing to ensure almost every seat has rain protection appears to be a particularly important driver behind more attendance, and the consequent social and economic benefits of the proposed project.

However, it is one of a long list of improvements, which are set out in the functional brief for redevelopment issued by the SCG Trust. While the SFS has close to 40,000 seats, it lacks the supporting facilities to make the most of this capacity. There is a need for more extensive internal services for patrons (food & beverage, toilets for both genders, passage to entry/exit, corporate entertainment facilities); for teams (number of change rooms); and for service providers (underground space for vehicle mobility). In particular, the evolution of professional female sporting codes is likely to accelerate and provide for greater scope of matches, and this requires considerable investment in adequate facilities.

Investments in external structures and terrain are also part of the proposed project. These elements are vital parts of the 'sportscape', which allow for congregation and meeting places that shape the visitor experience.

6.4.1 The Stadium Precinct and the City

International stadia and their surrounding precincts tend to be rich in character. The 'Sydney East' village (as defined by the City of Sydney (2015)) will be rejuvenated through connection to a precinct that will provide world class sporting and entertainment facilities and a vibrant environment for locals and visitors to the CBD.

Utilisation of Public Transport

Providing a modern stadium precinct and sportscape will increase local, interstate and international tourism. Increased city patronage will lead to a greater demand for public transport services.

The aim of integrating the stadium with the city is that when patrons visit the stadium, they will also take advantage of the other opportunities within the city. This is in contrast to the current reliance on cars as a mode of access to the stadium.

Walk Score is an independent corporation that calculates the walkability of different urban neighbourhoods by giving a rating out of 100 (higher being better). To assign a neighbourhood a Walk Score by doing regression analysis of population density and neighbourhood amenities, to determine how clustered a neighbourhood's population is around the buildings which they frequent (Walkscore, 2018).

Below are the trends in Walk Score for the stadium locality suburbs:

- Surry Hills is the 5th most walkable neighbourhood in Sydney with 15,379 residents. Walk score of 97
- Paddington is the 17th most walkable neighbourhood in Sydney with 12,132 residents. Walk score of 97

Though building a stadium downtown is a necessity if a stadium is going to have any effect of redeveloping the surrounding area, not all downtown stadiums are created equal. As the walkability data suggests, building the stadium in an area downtown that is easy to walk to, likely improves the chances that stadium will spur development in the surrounding area.

For one, less car traffic on game days means less impact on residents and business and also means more people will patronize the city that otherwise would have stayed away. Also, the fact that more people will walk to the stadium will increase the foot traffic around the restaurants and businesses that are located near the stadium.

The more car dependent a stadium is, the more fans will go right to the stadium and bypass opportunities to spend their money elsewhere. In addition, this effect might be doubled because businesses that may have had interest in developing around a stadium will be less likely to do so knowing that fans will not be spending much time in the surrounding area.

Current transport infrastructure investments will greatly reduce the travel times for patrons to the SFS. The CBD & South-East Light Rail will allow for concentration of services, particularly after evening events when multiple services can be scheduled to ensure rapid travel into the CBD.



Figure 10 – Sydney's Transport Infrastructure

Source: Ethos Urban, GSC (2018), RMS (2018), TfNSW (2018)

The upgrading of transport infrastructure and pedestrian connections associated with the city stadium will provide the opportunity for regeneration of the surrounding the Sydney East village. We note that the scale of accommodation in this region is currently very limited.

There is likely to be greater demand for tourist accommodation close to the stadium, with Oxford Street, Crown Street and other major roads. Planning conditions in the Sydney East village are limiting for short-term accommodation, due to height controls – even in the sections of commercial zoned lots along Oxford Street.

Fans that live further from the stadium have more difficulties to go to the games, whether because they do not have time to travel to the game, or because of money related issues, such as total price of travel, food, and ticket to attend. It is not just the time the activity takes, but *also the time that it takes to engage in it* (Rein et al., 2006).

6.5 Summary of impacts and mitigation measures

An important result from our analysis is that team memberships have tended to trend higher over the past decade. A shift towards team memberships have been evident for both NRL teams and AFL codes – it has occurred in both Sydney and Melbourne.

The outlined scope of a new stadium will provide a more equal distribution of amenity across all seating, reduce the wasted time of queuing and delays, and broaden the scope of event formats including professional female sporting codes. By design, a new stadium comprises a wide set of mitigation results. It is vital that the proposed stadium features and facets are embedded in the Stage 2 DA.

7.0 Economic Impact Assessment Methodology

This section describes the statutory context, relevant guidelines and methodology used for carrying out the economic impact assessment. To ensure that the potential impacts of the Project are best accounted for and recorded, and anticipated economic impacts are adequately assessed, the methodology in this section has been developed and applied.

7.1 Policies or guidelines

In the absence of formal guidelines available from the Department of Planning and Environment or City of Sydney for the definition of economic impact analysis, a methodology for this assessment was developed with consideration of the SEARs and the *Roads and Maritime Environmental Impact Assessment Practice Note - Socio-economic Assessment (EIA- N05 (Roads and Maritime, 2013))*.

The Practice Note provides a framework for assessing social and economic impacts of projects to ensure impact assessments are carried out consistently, to a high standard, and are properly integrated with other environmental assessments, design development and management processes.

The Socio-Economic Practice Note is not specific to a stadium redevelopment; however, given the demolition and construction phase (projected to be 3 years) and the project's inner city location, this practice note is suitable to inform methodology for this assessment. Based on the scale and nature of the proposed development, a detailed level assessment of the economic impacts of the Stage 1 DA components has been prepared in accordance with this practice note.

7.2 Methodology and data sources

A baseline profile for current businesses and the economy within a defined study area was developed using published data sources including the Australian Bureau of Statistics (ABS) and NSW Bureau of Transport Statistics (BTS) (2017).

Economic impacts were then evaluated in terms of **direct impacts** and **indirect impacts**.

Direct impacts relate to both construction activity and the scale of additional expenditure on resources within the redeveloped stadium precinct.

Indirect impacts are linked to expenditure by additional patrons outside of the stadium precinct. Due to the transport and movement anchors that run through Surry Hills and Paddington, a locality is centred on these suburbs is defined for analysis of indirect expenditure.

In the case of both direct and indirect effects, the key metrics for analysis is a projection of full-time equivalent (FTE) jobs or aggregated working hours. **Table 5** below summarises the factors of economic impact considered, metrics and data sources used to project change in FTE jobs for the purposes of this assessment.

Table 5 – Factors of economic impact, metrics and data sources

Project Impact	Metrics	Data sources
Construction expenditure (Direct impact)	Dollar value of construction works, and estimated wages component in order to estimate FTE jobs	Final Business Case (dollar value of construction works) (Final Business Case, 2018)
Stadium precinct jobs (Direct impact)	Evidence on scale of jobs for recent events, used to scale incremental jobs gain associated with increase attendance	SCG Trust employment data (direct employees, contract workers and event participants (e.g. club employees)) (SCG Trust, 2018c)
Expenditure by Sydney residents in the locality (cafes,	Evidence on average spend by Sydney resident visits into CBD, grossed up by the estimated additional attendance by Sydney residents	Destination NSW (2017), Final Business Case (2018); ABS Input-Output tables (ABS, 2015); Census

Project Impact	Metrics	Data sources
restaurants and pubs) (Indirect impact)		2016 data (ABS, 2016a); ABS Business Count Data (ABS, 2013, 2015, 2017)
Expenditure by intrastate and interstate residents in the locality (cafes, restaurants and pubs) (Indirect impact)	Evidence on average spend by intrastate and interstate visits into CBD, grossed up by the estimated additional attendance by this cohort	Destination NSW (2017), Final Business Case; ABS Input-Output tables; Census 2016 data (ABS, 2016a); ABS Business Count Data (ABS, 2013, 2015, 2017)
Expenditure by intrastate and interstate residents in the locality (accommodation) (Indirect impact)	Evidence on propensity of intrastate and interstate visits stay in short-term accommodation, grossed up by the estimated additional attendance by this cohort	Destination NSW (2017), Final Business Case (2018), ABS Input-Output tables; Census 2016 data; ABS Business Count Data (ABS, 2013, 2015, 2017)
Potential impact of additional working hours on residents in the locality (in particular, part-time and casual work in local businesses) (Indirect impact)	Census data on number of young adults, who are expected to be the key labour market for the local accommodation and food service sectors	ABS, 2016a; ABS Business Count Data (ABS, 2013, 2015, 2017)
Impact of stadium demolition on local expenditure (Direct impact)	Plans are for the SCG to accommodate a large majority of planned SFS events during the construction period	Final Business Case (2018), Table 1

Source: Ethos Urban

Our methodology for assessment is anchored by the Final Business Case (Final Business Case, 2018) projections for additional attendance achieved through redevelopment, as compared to refurbishment. These projections define additional attendance numbers per annum (average) and events per annum. The Final Business Case also includes projections of construction cost, which provide the basis for employment as a **direct impact** of redevelopment.

A separate perspective on **direct impacts** is provided from SCG Trust data (SCG Trust, 2018a) This detailed dataset provided number of persons employed on the full spectrum of tasks within the stadium. The dataset distinguished the number of workers for events of different scale, which provided some insight as to the impact of higher attendance and more events.

The quantification of positive and/or negative **indirect impacts** on businesses in the locality as a result of the project, is where possible, measured through:

- **Turnover:** The projected net change in expenditure (\$) generated by local businesses, and the labour value-added.
- **Employment:** The projected net change in the number of people employed in local businesses. The change in employment is measured by total employment and full time equivalent (FTE) employment. The latter measure converts the number of full time, part time and casual employees into a unit equivalent to the number of full time employees.

Given the nature and scale of the proposed development, the timeframes for consideration of economic impacts were determined to be:

- **Demolition and construction impacts:** short-term (less than or equal to three (3) year construction phase);
- **Operational impacts:** medium-term (immediate post-construction impacts, between 3-5 years); and
- **Operational impacts:** long-term (ongoing operational impacts, three (3) years+).

Key components of analysis are described in further detail below:

Expenditure by Sydney Residents

A proportion of additional local patrons to the stadium are expected to spend at food and beverage establishments. The proportion of local patrons expected to engage in this activity is expected to be 60%, with an average spend of \$20 per person per attendance. The average spend value was referenced from Destination NSW (2017) survey data.

Expenditure by intrastate and interstate residents

A proportion of intrastate and interstate residents will have impacts that are symmetric with local residents. This expectation follows from visitors staying with family and friends. A proportion of intrastate and interstate visitors will stay in short-term accommodation. This behaviour will generate demand for extra room nights and thereby stimulate demand for additional development. It seems likely that this development would occur along the light rail corridor, extending as far as Randwick and Kingsford terminuses.

Direct Employment in Construction Work

Job estimates are provided on a full time equivalent basis. Estimates of job numbers are calculated using the NPV of the stadium redevelopment (see table 2 of the final business case).

Direct employment in Stadium

SCG Trust provided data on a number of workers across a set of large and small events. These numbers were analysed, in order to estimate the incremental impact of extra events and more attendance per event. Expenditure into working hours ABS input-output tables provide guidance on the labour value added from the accommodation and food services industry (per dollar spent). This ratio was applied to spend on accommodation and food services, calculated as hours worked.

7.3 Study area definition

The study area for the Economic Impact Analysis differs from the Social Impact Assessment study area. While the SEARs refer to evaluation of social impacts generally occur on a whole of city level (for operational stage), business impacts including changes to employment generally occur at the location of the business activity.

This is due to the fact that businesses generally rely on the attractiveness and accessibility of their location to induce business activity. As such, businesses that reside far beyond the boundaries of the project are unlikely to be significantly impacted by the project.

To better understand the local population and economic impacts generated by the redevelopment of the stadium a study area that geographically represents the population and economy likely to experience localised impacts has been defined.

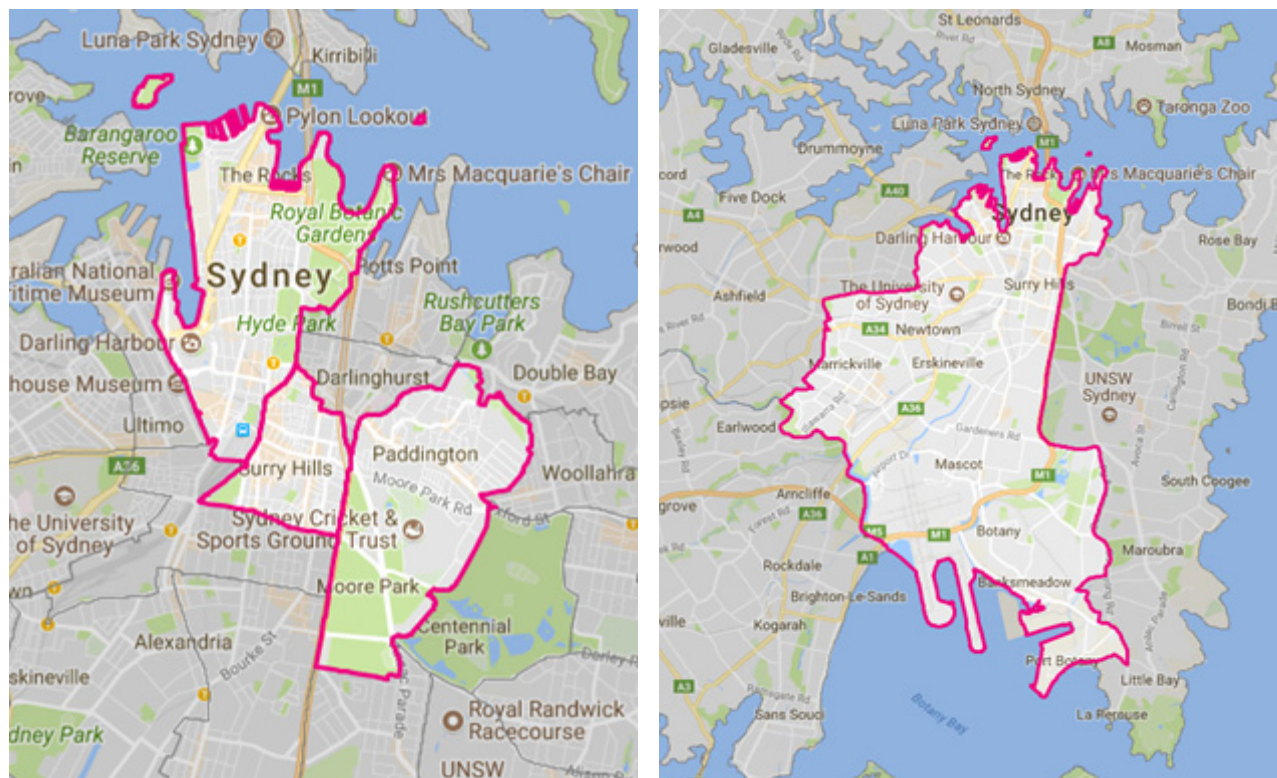
The local area represents the area surrounding the stadium which is likely to experience the localised population and economics impacts from the construction and operation of the stadium and includes the Sydney – Haymarket – The Rocks, Paddington – Moore Park and Surry Hills Statistical Areas (SA2). The local area represents the population, businesses, industries, land uses and transport infrastructure likely to experience the greatest range of localised impacts from the operation of the redeveloped stadium (refer Figure 11).

A wider set of SA2 regions could be used to define the study area but that would not change the aggregate estimates. The selected SA2 regions are used to provide insights into the nature of local households, businesses and workers. In terms of concentration of impact, the Surry Hills SA2 region is expected to be the leading edge due to the future delivery of the light rail service.

As data at the SA2 region level has constraints on range and depth of information. To supplement the analysis, the SA4 Sydney–City and Inner South was included for some indicators. Refer to Section 7.2 for assumptions relating to this limitation.

The wider catchment area for the project is defined as the Greater Sydney Greater Capital City Statistical Area (Greater Sydney GCCSA) and is the statistical representation of the Greater Sydney area. The SA2s identified within the study area are located within the Greater Sydney GCCSA.

Figure 11 – Study Area Definition



Source: Googlemaps, Remplan

7.4 Data sources

The following data sources have been used to inform the economic impact assessment.

- Couch, B. 2017. *Adelaide Oval Is fuelling a tourism boom led by Victorians*. Adelaidenow.com.au (Accessed via <http://www.adelaidenow.com.au/news/south-australia/adelaide-oval-is-fuelling-a-tourism-boom-led-by-victorians/news-story/803e377ae9532b63cd70d20fb2ef585e> April, 2018) (Adelaidenow, 2017)
- Australian Bureau of Statistics (ABS). 2016a. *2016 The Census of Population and Housing*. (ABS, 2016a)
- Australian Bureau of Statistics. 3401.0 Overseas Arrivals and Departures, Australia. (ABS, 2018a)
- Australian Bureau of Statistics (ABS). 2017. 8752.0 - Building Activity, Australia, Dec 2017 (ABS, 2017a)
- Australian Bureau of Statistics (ABS). 2013. 8165.0 - Counts of Australian Businesses, including Entries and Exits. (ABS, 2013)
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- Australian Bureau of Statistics (ABS). 2018. *Labour Force, Australia, Detailed, Quarterly Feb 2018*. (ABS, 2018b)).
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- Australian Bureau of Statistics (ABS). 2018. 3101.0 - Australian Demographic Statistics, Sep 2017. (ABS, 2018c)
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- de Carvalho, M., Sarmiento, J. P., Boen, F., & Scheerder, J. (2013). Love For the Club, Love for the Stadium? The Relationship between Sportscape Perception, Place Attachment, and Soccer Attendance among Belgian Fans. Book of abstracts of the 21st Annual European Sport Management Conference (EASM), pp. 383-386.
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- Neale, L., & Funk, D. (2006). Investigating motivation, attitudinal loyalty and attendance behaviour with fans of Australian Football. *International Journal of Sport Marketing & Sponsorship*, 7(4), 307-317.
- NRL Membership Data, 2018 (NRL.com, 2018) (accessed April, 2018)
- Roads and Maritime. 2013. Roads and Maritime Environmental Impact Assessment Practice Note - Socio-economic Assessment (EIA- N05) (Roads and Maritime, 2013).
- SCG Trust. 2018a. Data for Workers by Events. (SCG Trust, 2018a)
- SCG Trust. 2018b. Attendance by Postcode data. (SCG Trust, 2018b).
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- Eugene Sivadas, Jamie L. Baker-Prewitt, (2000) "An examination of the relationship between service quality, customer satisfaction, and store loyalty", *International Journal of Retail & Distribution Management*, Vol. 28 Issue: 2, pp.73-82
- Tourism Research Australia. 2018. National and International Visitor Surveys, TRA. (TRA, 2018)
- Trail, Galen & Fink, J.S. & Anderson, D.F.. (2003). Sport spectator consumption behavior. *Sport Marketing Quarterly*. 12. 8-17
- Wakefield, K.L., & Blodgett, J.G. (1996). The effect of the servicescape on customers' behavioral intentions in leisure service settings. *Journal of Services Marketing*, 10(6), 45 – 61

7.5 Assumptions and limitations

- The Final Business Case Summary, is an essential basis for evaluating the impacts of the project.
- The Darlinghurst SA2 region has not been included in the study area as only a small part of the residential area is within the walking catchment of the stadium.
- We have used the Sydney – City and Inner South SA4 region to evaluate specific employment data, as it is only available as trend data at this level. In addition, this region is expected to comprise many of the employees that work within the stadium locality. Furthermore, the future metro service will draw from workers in this region via Waterloo station and into the CBD stations.
- For the purpose of the EIA, an affected business has been defined as a business that would be impacted by changes in amenity, changes to accessibility or changes in the volume of passing trade due to additional attendance at the operation of the new stadium.
- The preparation of the EIA has not included direct consultation with businesses, individuals or industry groups. The use of information obtained from primary research was limited to that undertaken by the SCG Trust, and also that embedded within the findings of the Final Business Case. There are separate Engagement and Visual Impact studies.
- An assessment of the impact of the project on residential and commercial property prices has not been included in the preparation of the EIA. There are a large number of factors that influence the value of a property and as such a reliable assessment of the interaction between the project and the property market cannot be made with any certainty.
- The estimates of spending and related impacts presented in this report are based on the scale of attendance increase from a redeveloped stadium, from existing and new events at the facility. These operating impacts are based on a variety of data, including information provided by the sporting codes, the SCG Trust and other stadium operators, and the results of surveys of attendees.

- It should be noted that Ethos Urban has not conducted an independent market study or surveys to validate the increased scale of attendance for a reconstructed stadium. The purpose of this report is to evaluate the likely composition of social and economic effects. Exemplars of activities at recently developed new facilities are evaluated, to provide reference metrics.
- It should be noted that the impacts discussed in this report extend to additional impacts that are likely to be generated by ancillary development in close proximity to the stadium. These forms of ancillary development are included in the job estimates where it seems most substantive. In particular, the prospect of a boost to interstate and interstate tourism is expected to support the development of additional hotel accommodation in proximity to Moore Park or new light rail terminuses at Randwick and Kingsford.
- The initial step in estimating the economic impacts generated by the ongoing operations of a multi-purpose facility and tenant sporting codes is to develop assumptions pertaining to annual events and attendance as well as per capita spending levels of stadium patrons. These projections are informed by detailed data provided by the SCG Trust (SCG Trust, 2018a-c).
- The key assumptions relate to sporting events games, including seat location, premium seating inventory and access to amenities, and other such operating assumptions, are based on information embedded in the Final Business Case and other industry data. The operating assumptions detailed above inform the social and economic impact estimates discussed throughout the remainder of this report.
- The analysis includes assumptions for regular sporting codes as well as various other recurring and non-recurring events that are envisioned to utilize the new stadium.

8.0 Economic Impact Assessment

The project is expected to generate a number of economic benefits that will support and enhance the local, wider Sydney and National economy through generation of both direct and indirect employment growth.

A summary of the key metrics determined through this Economic Impact Assessment are summarised in Table 6 below. Detailed analysis follows in this section of the report.

Table 6 – Projected employment impacts – direct and indirect

Metric	Value
Direct - Construction Jobs	
Construction Estimate (Option 1 Adjusted Scope)	\$593 Million
Jobs per \$million	3
Estimated FTE Jobs	600 FTE jobs pa over three years
Direct – Stadium Operation Jobs	
Increase in Attendance from Base Case per Annum	254,000
Number of Events (Option 1 Adjusted Scope) (mid-point)	49.5
Increase in Attendance per Match per Annum	5,126
Increase in the Number of Jobs (FTE) per Annum	300
Indirect Jobs	
Expenditure on food & beverage (F&B) businesses (local area)	\$6m per annum
Increase in F&B employee hours worked	180,000
Part-time jobs p.a. at 10 hours per week	346

Source: Ethos Urban; Final Business Case, 2018; Sydney Cricket and Sports Ground Trust (SCG Trust, 2018a)

8.1 Economic baseline profile

Analysis of the following baseline data has been used to inform this assessment of economic impacts.

8.1.1 Government expenditure (entertainment and recreation) and tourism

Tourism tends to be founded on building assets that are invested by Governments rather than the private sector. Even the design itself can create a hugely valuable tourism asset through overnight stays and draw into regional NSW, as the Sydney Opera House demonstrates.

Economics is based on the need for allocation of scarce resources amongst competing needs. Entertainment and recreation infrastructure has a complex position as one of the public sectors competing needs. The recent action on tourism building in Sydney has been one of reducing the stock of assets, rather than expansion.

Remarkably, Sydney has weathered this situation, due to the boom in overseas tourism. From a risk profile, it is preferable to diversify the city's entertainment and recreation assets, particularly in the City of Sydney. Visitors to the City of Sydney can come from the Greater Sydney area, the rest of NSW, interstate or overseas.

The Vivid Festival exemplifies the city's ability to draw a diversity of visitors, particularly for the night-time economy which provides balance to the dominance of day-time business trade.

By comparison, investment in the redeveloped stadium represents a substantial value of capital works over three years. Public sector expenditure on Vivid is needed each and every year, as it provides services rather than establishing a capital asset.

We note that Australians are increasingly spending recreation dollars overseas – a leakage from economic growth. To date, the impact of this leakage has been offset by a boom in overseas tourism arrivals. Despite our tourism

gains, government spending on entertainment and recreation facilities has been flat for many years. Yet the entertainment and recreation building works are dependent on public spending, as facilities trend to be very capital intensive.

By comparison, private sector spending on health and education is very substantial. NSW has a very strong trend on delivery of health and education buildings, albeit the funding source has shifted to the private sector. Public sector expenditure on entertainment and recreation building has languished – and if the demolition of the Sydney Entertainment Centre is factored in, then the net change in stock is even weaker than the building approvals convey.

At the margin, the lack of public and private investment in domestic entertainment and recreation infrastructure has contributed to trend growth by Australians on expenditure overseas. On this basis, there has been a loss of competitiveness in the choices by Australian residents.

At the same time, overseas tourism has provided a strong boost to Sydney's economy. This overseas tourism boom has to a large extent emerged due to greater travel flexibility and higher average incomes across Chinese households. There has also been visitation to Sydney's temporary and permanent migrants (including students and skilled workers), as a distinct mode of tourism.

It now appears that visitation from China and South East Asia is softening and the need to draw back overseas tourism spend by residents will become a greater policy focus (see chart below). This environment sets the scene for the delivery of a new stadium as a tourism asset.

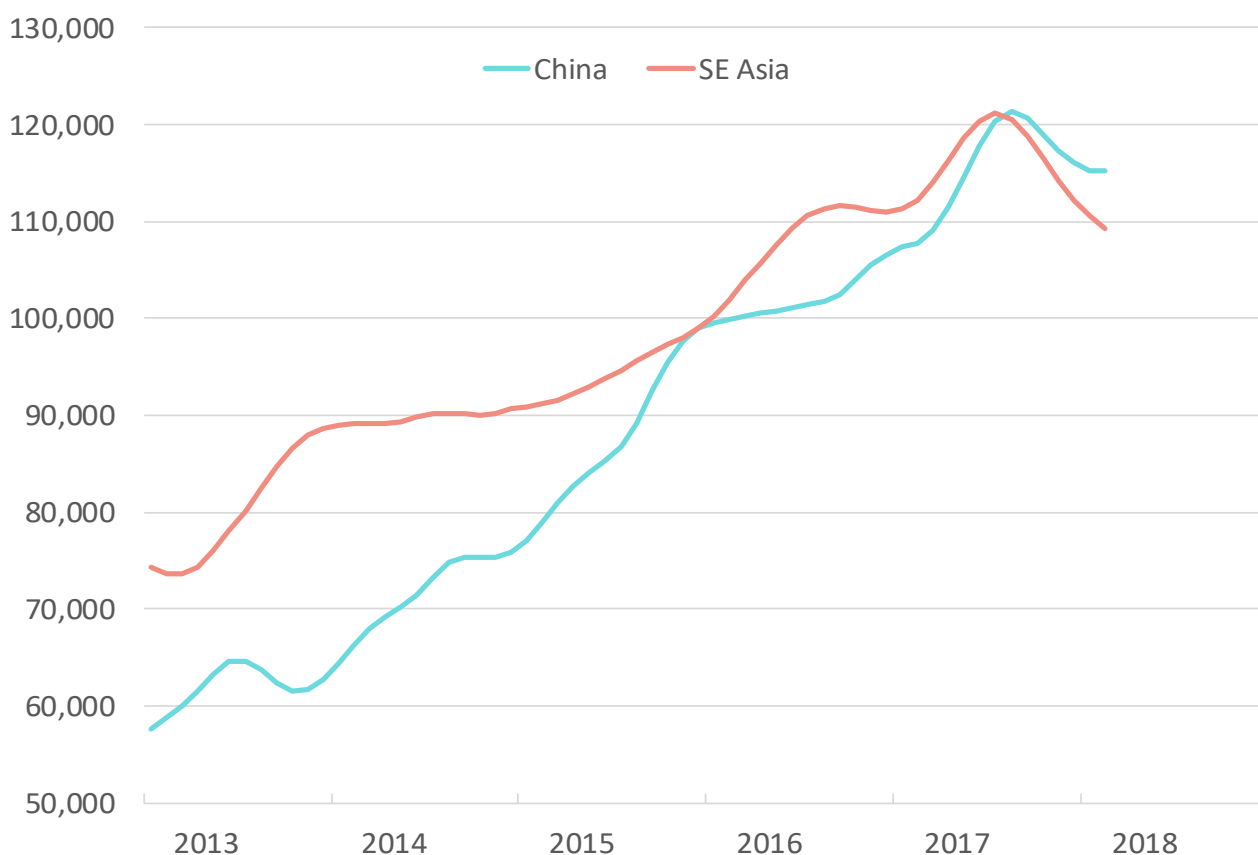


Figure 12 – Short-Term Movement, Visitors Arriving – China & SE Asia (Trend, Monthly)

Source: ABS 2018a

Sydney has benefited greatly from this tourism boom. Based on nights stayed per visitor, the effective boost to population growth has been equivalent to 0.5% per annum. Business activity has benefited greatly, along with

property development, and this has contributed greatly to the revenues of the State Government and the City of Sydney.

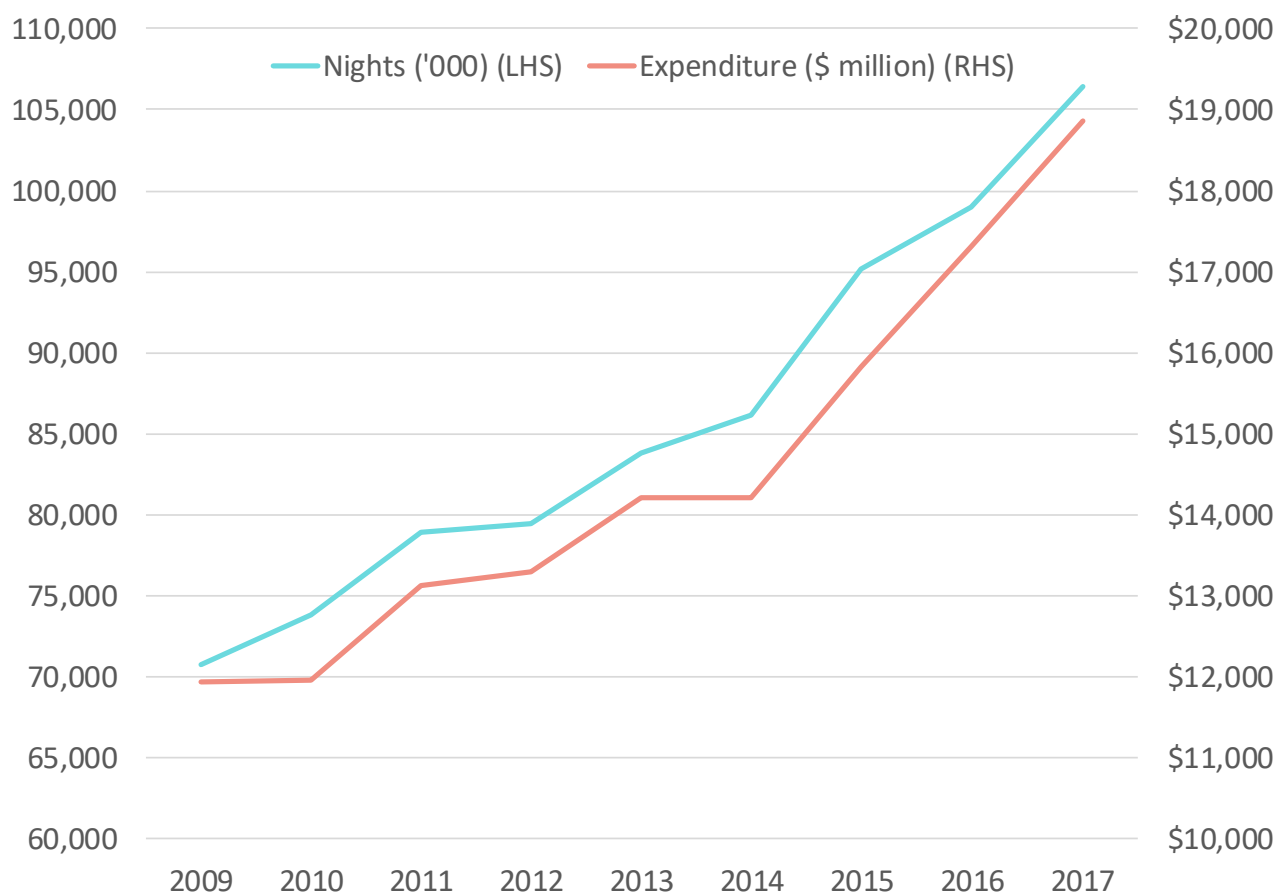


Figure 13 – Sydney Tourism – Nights and Expenditure (Year to December)

Source: TRA, 2018

However, recent evidence shows that overseas arrivals are now flattening out. Arrivals from China and South-East Asia are now showing a trend decline.

Based on the most recent tourism data, Sydney's economy appears to be on the cusp of a major shift in conditions. This environment raises the imperative to increase local expenditure on entertainment and recreation facilities in Sydney and regional NSW. The proposed project represents one of the first major investments for almost two decades.

The Final Business Case provides estimates that a new stadium would cost in the order of \$573 to \$593 m (expressed in 2018 prices). These capital expenditure figures are from table 1 of the report and express the capital expenditure in net present value terms, that is, the discounted (at a discount rate of 7%) future capital expenditure of the project. There are a second set of figures on this option which are provided in table 2 of the Final Business Case (2018). These figures are not the net present value that underpins the values in table 1.

On average, the Entertainment & Recreation sector has accounted for 12% of public sector building expenditure over the past twenty years. Based on the business case projections for the proposed stadium cost, the investment life is up to 50 years, so that there is an annualised capital cost of close to \$11 m. This value of the annualised capital cost is equivalent to a 5% of all public sector expenditure on Entertainment & Recreation buildings over the next 50 years. Expenditure on the proposed project stadium construction represents just 2.5 years of total public sector spending for this sector.

8.1.2 Local population and economic connectivity

To better understand the economic impacts generated by the redevelopment of the stadium a study area that geographically represents the population and economy likely to experience localised impacts has been defined (refer Chapter 7) and relevant Census data used to inform analysis of impacts. A summary of findings relevant to the preceding analysis of economic impacts is shown below.

Local population

At the time of the 2016 Census (ABS, 2016a), the local area had a relatively younger population when compared to Greater Sydney, with a median age of 32 compared to a median age of 36 in Greater Sydney. As shown in **Figure 14** below, 46% of the population within the local area was aged between 20 to 34 which compares to 23% of the total population within Greater Sydney.

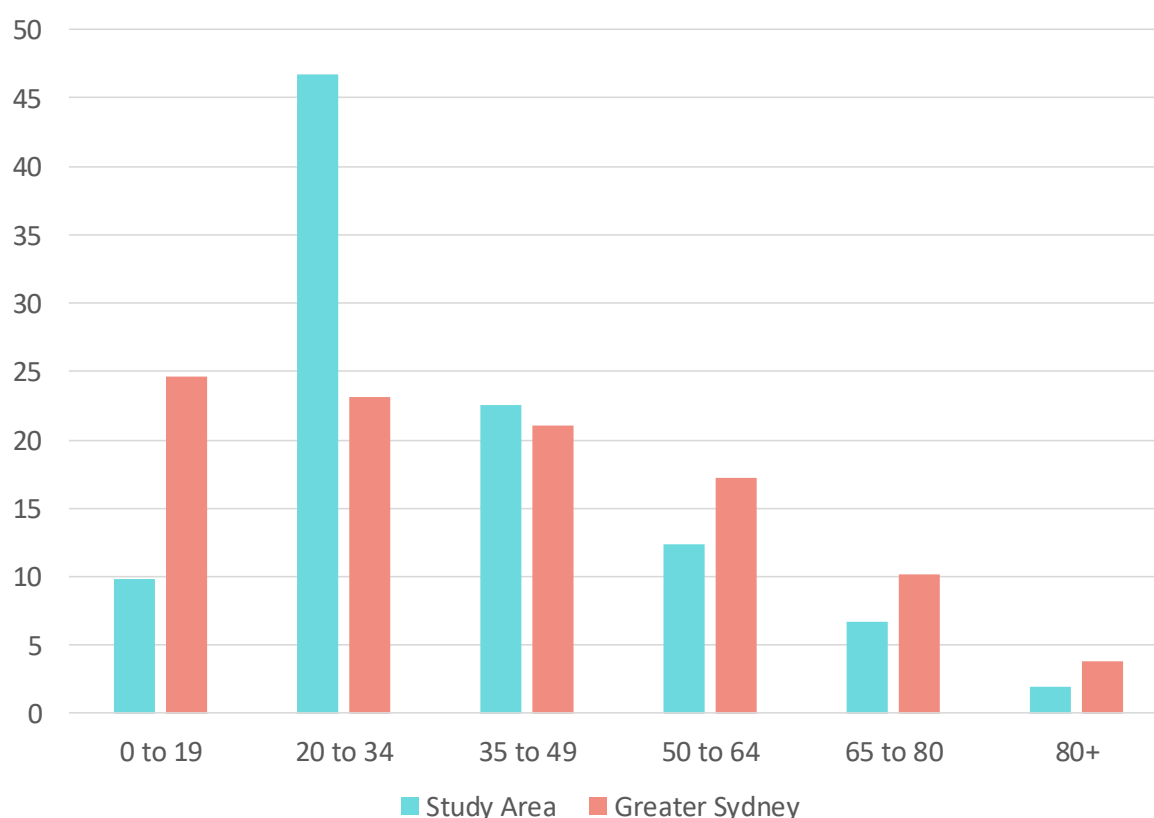


Figure 14 – Age Distribution (%)

Source ABS; 2016a; Ethos Urban

Note: Study area is defined as the combined the Sydney – Haymarket – The Rocks, Paddington – Moore Park and Surry Hills Statistical Areas (SA2)

The high proportion of young adults within the local area (relevant SA2s are defined in Section 7.3) is explained by the attractiveness of the local area for tertiary students and recent graduates due to the area's convenient access to a range of tertiary education facilities and a significant concentration of employment opportunities within the Sydney CBD.

The relatively high concentration of younger residents within the local, in particular those aged between 20 to 34, indicates a need to ensure there is adequate access to employment opportunities. In particular, options for part time and casual work are important due to the flexible matching of study and work.

Analysis of the wider labour market (defined as Sydney City and Inner South SA4 due to data reporting limitations), between 2013 to 2018 revealed that there was limited employment growth within the 15 to 24 age cohort whereas most other age groups experienced moderate to large increases in employment.

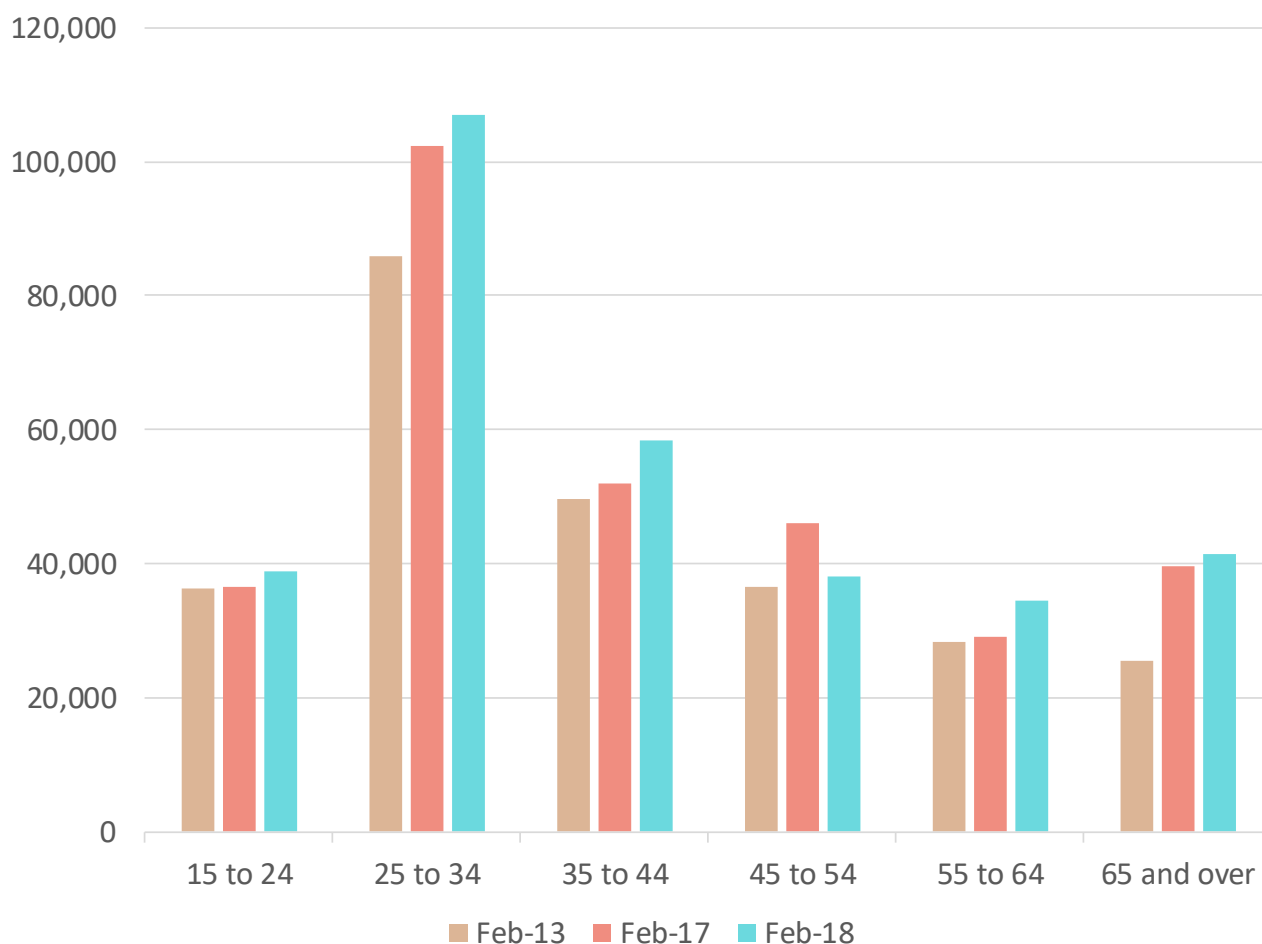


Figure 15 – Change in Age Distribution of Workforce – Sydney City and Inner South SA4

Source: ABS, 2018b.

Note: Sydney City and Inner South SA4 used is the smallest geographical area for which level of employment by age cohort is reported by the ABS and encompasses the majority of the local study area.

Industry of employment

To better understand the potential local population and economic impacts of the stadium redevelopment it is important to examine the industries that typically employ younger workers and how these will be directly or indirectly impacted by operation of the redeveloped stadium.

Businesses and industries that typically seek a younger labour force are Accommodation and Food Services, Retail Trade, Other Services and Arts and Recreation Services. These industries often don't require skilled labour and have peak trading periods outside of traditional business hours. As such these industries typically seek part time or casual workers to service peak trade times such as weekends, major events, after business hours or school holidays. These employment conditions are ideally suited for students who are seeking employment opportunities which are flexible, limited impact on their study schedule and do not previous skills or experience.

Given the significance of these industries as a key source of employment for young adults, the distribution of employment across these industries has been analysed by five year age groups in the local labour market. As shown in **Figure 16**, around a quarter aged between 15 to 24 were employed within these core industries.

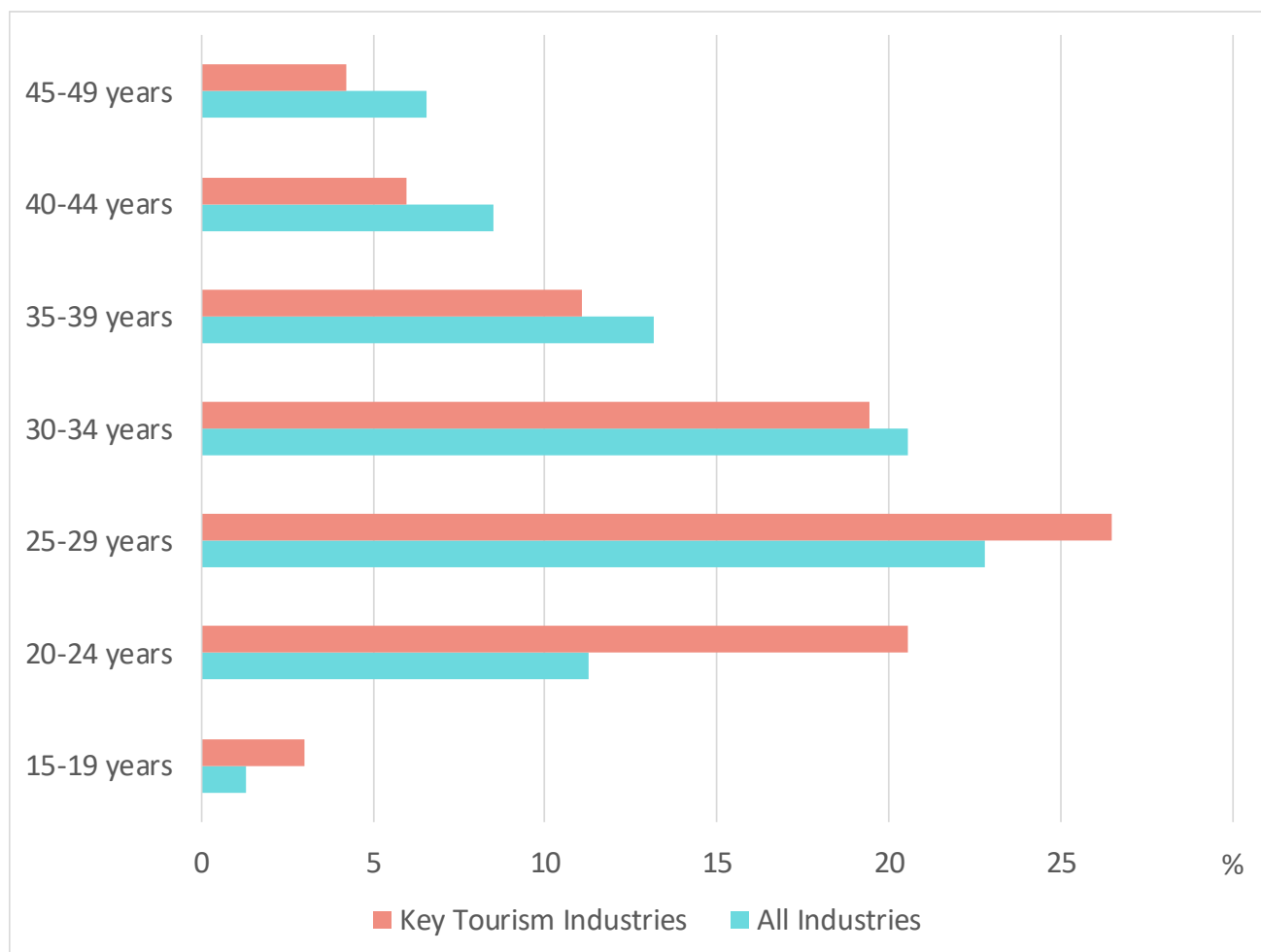


Figure 16 – Proportion of Employment within Industry Groups by Five Year Age Groups

Source: ABS, 2018b

Note: Selected industries are: Accommodation and Food Services, Retail Trade, Arts and Recreation and other Services.

Aside from these industries being a key employer for the younger population within the local area they also represent a significant share of total employment for entire the local area. Analysis of the industry of employment within the local area indicates that at the time of the 2016 Census almost a third of residents were employed in Retail Trade, Accommodation and Food Services, Arts and Recreation and Other Services.

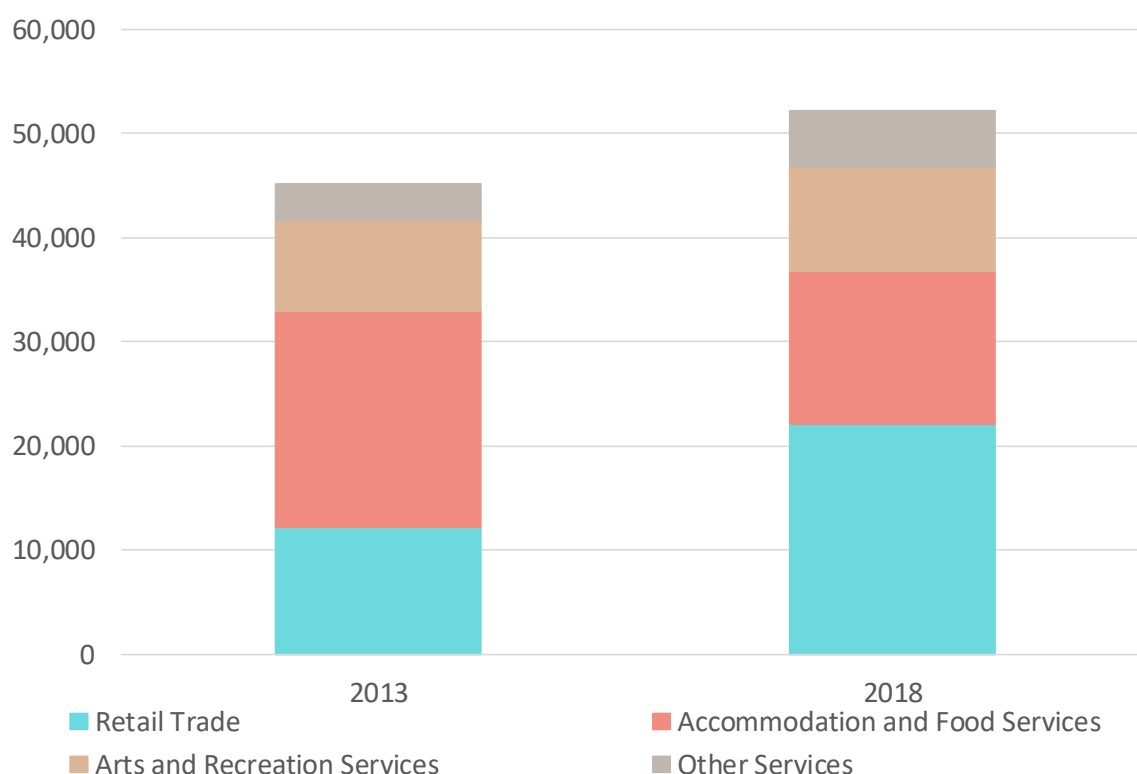


Figure 17 – Employment Distribution by Industry (Sydney - City and Inner South SA4)

Source: ABS, 2018b; Ethos Urban

The Accommodation and Food Services industry employed the greatest number of residents, approximately 5,785, within the local area. This was followed closely by Professional, Scientific and Technical Services which accounted for employing approximately 5,761 residents. The high proportion of employment within the Financial and Insurance Services, Health Care and Social Assistance and Education and Training is likely a result of the large number of major education and healthcare facilities within the local area and concentration of professional services within the Sydney CBD.

As the area includes the Sydney CBD it can overrepresent the industries of employment such as Professional, Scientific and Technical Services and underrepresent the significance of industries that typically employ a younger workforce. For this reason, it is important to isolate the industry of employment results for residents within the Sydney – Haymarket – The Rocks SA2 with the remaining areas of the local study area.

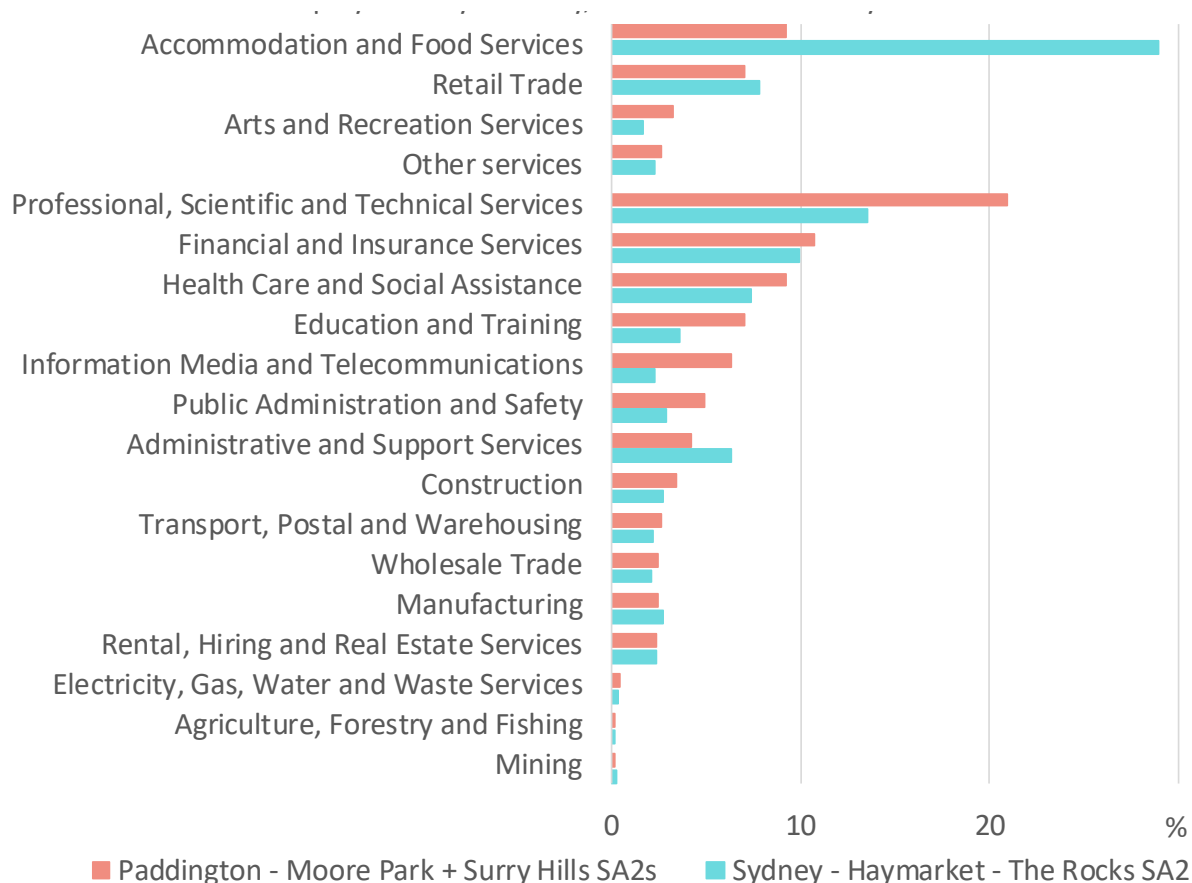


Figure 18 – Employment by Industry of Local Residents in Specified SA2s, Local Areas

Source: ABS, 2016a; Ethos Urban

Between 2013 and 2018 employment within Accommodation and Food Services declined by approximately 6,000 persons within the local area. Whereas, there has been a large increase of around 9,900 persons in Retail Trade, while Arts and Recreation Services and Other Services, have increased only modestly, at around 1,200 and 1,900, respectively.

For the Accommodation and Food Services sector, the decline in the resident employment of the broader SA4 region is curious, given that Sydney has enjoyed a tourist boom over the past five years. The most likely explanation is that the challenging trading conditions in the retail sector has led to tightening of employment and hours. It seems likely that there is considerable underemployment amongst young adults. Expenditure on overseas holidays by interstate residents has more than offset the inwards tourism boom, leading to soft conditions for discretionary spending on accommodation and food services.

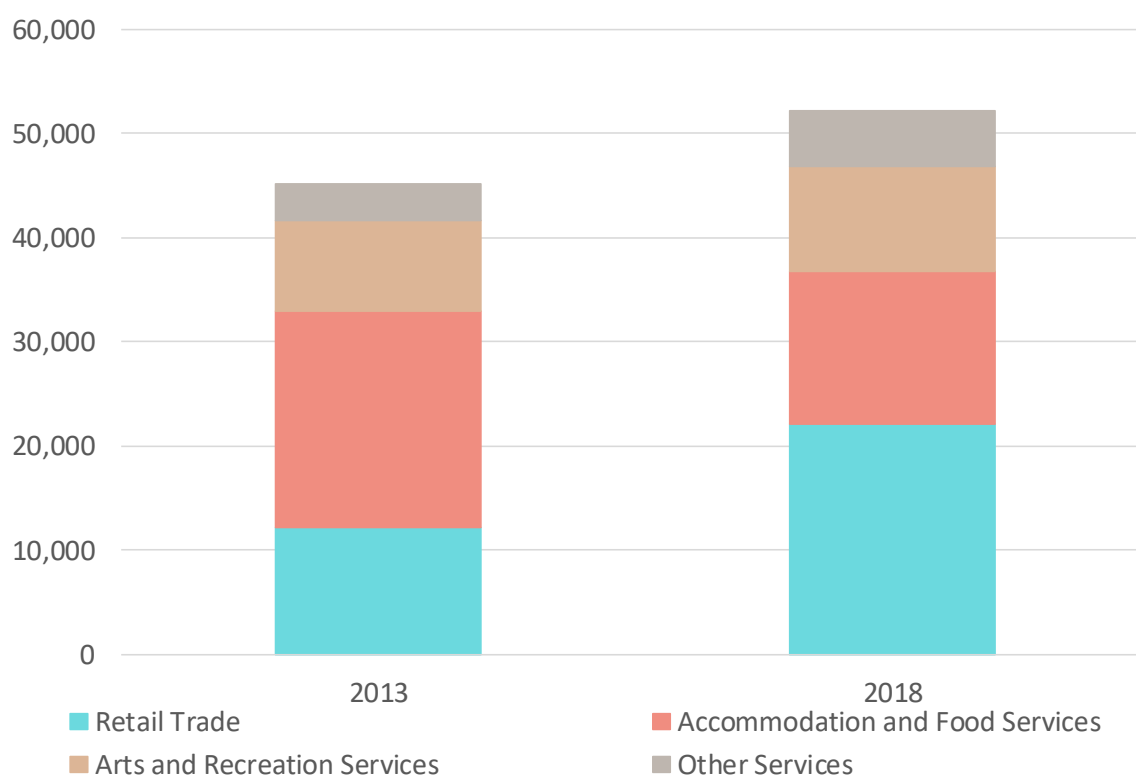


Figure 19 – Change in Employment Across Selected Industries – Sydney City and Inner South SA4

Source: ABS, 2018b; Ethos Urban

Local business profile

During this same period the number of businesses within Accommodation and Food Services and Retail Trade declined or experienced limited growth within Surry Hills as outlined in Table 7 below, while businesses in other industries experienced stronger growth. In Paddington – Moore Park, business grow has been relatively flat, as outlined in Table 8.

Table 7 – Business Count by Size Across Selected Industries, Surry Hills SA2 (June 2013 to June 2017)

	5-19 Employees	20-199 Employees	200+ Employees	Total
Number as at June 2017				
Professional, Scientific and Technical Services	188	77	0	265
Accommodation and Food Services	72	35	0	107
Retail Trade	27	16	0	43
Change between June 2013 and 2017				
Professional, Scientific and Technical Services	-7	25	0	18
Accommodation and Food Services	-7	12	0	5
Retail Trade	-13	5	0	-8

Source: ABS, 2013; ABS, 2017; Ethos Urban

Table 8 – Business Count by Size Across Selected Industries, Paddington – Moore Park SA2 (June 2013 to June 2017)

	5-19 Employees	20-199 Employees	200+ Employees	Total
Number as at June 2017				
Professional, Scientific and Technical Services	37	9	0	46
Accommodation and Food Services	28	14	0	42
Retail Trade	29	5	0	34
Change between June 2013 and 2017				
Professional, Scientific and Technical Services	[-1	0	0
Accommodation and Food Services	8	-1	0	7
Retail Trade	0	-1	0	-1

Source: ABS, 2013; ABS, 2017; Ethos Urban

8.2 Assessment of economic impacts

An assessment of the economic impacts associated with the demolition/construction phase, and operational phase of the stadium are discussed in the following section. The economic factors evaluated are listed in Table 9 below. Key assumptions underlying this assessment are noted in Section 7.4 of this report.

Table 9 – Economic factors and impacts considered

Project phase	Economic factors	Impacts considered
Demolition & construction	Expenditure & employment impacts	<ul style="list-style-type: none"> Construction expenditure (Direct impact) Impact of stadium demolition on local expenditure (Direct impact)
	Additional impacts	<ul style="list-style-type: none"> Supporting local businesses (Indirect impact)
Stadium operation	Employment impacts	<ul style="list-style-type: none"> Stadium precinct jobs (Direct impact)
	Expenditure impacts and night time economy	<ul style="list-style-type: none"> Expenditure by Sydney residents in the locality (cafes, restaurants and pubs) (Indirect impact) Expenditure by intrastate and interstate residents in the locality (cafes, restaurants and pubs) (Indirect impact) Expenditure by intrastate and interstate residents in the locality (accommodation) (Indirect impact) Potential impact of additional working hours on residents in the locality (in particular, part-time and casual work in local businesses) (Indirect impact)

8.2.1 Impact of demolition and construction on expenditure and employment

This section analyses the direct impacts of demolition and construction activity on expenditure and employment.

The initial economic impacts generated by the project will occur during the demolition and construction phase, which is expected to span three years. The development cost of \$573 million (as presented in the Final Business Case in net present value terms) will consist of construction spending and ancillary development costs. This level of economic activity is estimated to support close to 600 FTE jobs per annum over the three-year period. These jobs and related earnings represent construction jobs as well as jobs supported in other industries as a result of project-related spending.

Table 10 – Estimate of FTE Jobs Generated During the Construction Phase

Metric	Value
Construction Estimate (Option 1 Adjusted Scope)	\$593 Million
Jobs per \$million expenditure (FTE basis)	Approximately 3
Estimated FTE Jobs	600 FTE Jobs pa over three years

Source: ABS; 2015; Ethos Urban; Final Business Case, 2018

8.2.2 Impact of demolition and construction on local businesses

An indirect impact on employment and expenditure of demolition and construction activity, during construction, local businesses are expected to benefit from 3-year phase of workers travelling to and from Central Station. These movements will create out of peak demand, given that working hours are geared around shifts.

8.2.3 Impact of stadium operation on employment and expenditure

This section analyses the direct impacts on employment and expenditure from additional attendance at the stadium as a result of the proposed development.

Employment impacts

The mix of increased attendance is expected to be from Sydney residents and intrastate/interstate residents, noting that the attraction of interstate residents is founded on improved quality of amenity of the new stadium.

Location of residence of additional attendance

The Final Business Case has provided projections in annual attendance at SFS events under the proposed project (as shown in Table 1, Final Business Case, 2018). For a new stadium of 45,000 seats, the increase in annual attendance is projected to be close to 250,000. Total is calculated as the incremental effect of redevelopment versus refurbishment (as set out in Table 1 of the Final Business Case Summary document (Final Business Case, 2018)).

Our analysis sets out to validate the basis for a major increase in patronage, drawing on analysis of the social and economic impacts of the proposal.

Our expectation is that the boost to attendance will flow primarily from Sydney residents, but that there will be significant contributions from intrastate, interstate and overseas residents. The projected composition of impact by residence is shown in the table below.

Estimates of spending associated with increased attendance were based on the scale of attendance increase from a redeveloped stadium, from existing and new events. The new stadium is expected to have a seating capacity on par with the existing stadium. Consequently, it is likely that some forms of employment will not increase significantly.

Estimates of employment for specific matches held at SFS in the recent past were provided by the SCG Trust. This dataset shows some variations for larger attendances than for regular attendance levels. In this case, a higher level of attendance per match would be expected to generate more working hours. This outcome is further supported through the design intent to increase points of sale for food and beverages.

Further, there is expected to be more events held at a new stadium (as specified in the final business case). In this case, there would be a rise in working hours from new events.

It is difficult to specify an aggregated employment impact, due to the mix of full-time, part-time and casual employment. In many cases of service contribution, there would not be more persons employed per se, but rather more working hours available to existing workers.

As such, we have approached the employment impact through an estimation of increased working hours. This increase can be expressed in FTE terms.

Our projections show an increase in attendance would raise the number of total working hours for by 15%, when compared with the current stadium operations. This increase would be equivalent to 300 FTE jobs as shown in Table 11 below.

Table 11 – Estimate of Additional FTE Jobs Generated from New Stadium

Metric	Value
Number of Jobs per 1000 Attendees	55 – 61
Increase in Attendance from base Case per Annum	254,000
Number of Events (option 1 Adjusted Scope) (mid-point)	49.5
Increase in the Number of Jobs (FTE) per Annum	300

Source: Ethos Urban; Final Business Case 2018; SCG Trust, 2018a

Note: need to further refine allocation of FTE across a number of job types

Indirect effects of expenditure impacts on employment

This section analyses the indirect impacts of expenditure within the stadium locality from additional attendance at the stadium as a result of the proposed development.

Our analysis of expenditure impacts within the locality includes consideration of:

- Expenditure by Sydney residents, intrastate and interstate visitors in the locality (cafes, restaurants and pubs) (Indirect impact)
- Expenditure by intrastate and interstate residents in the locality (accommodation) (Indirect impact)

Assessment is based on the anticipated profile of increased stadium attendance shown in Table 12 below.

Table 12 – Profile of increased attendance

Place of residence	Numbers
Sydney residents	175,000
Interstate & intrastate & overseas	75,000
Total increase (Final Business Case)	250,000

Source: Ethos Urban; Final Business Case, 2018

8.2.4 Impact of stadium operation on the night time and visitor economy

Greater spend is expected to be localised in proximity to the stadium, through higher attendance at night-time events. Higher attendance is expected to be generated by the sportscape between the stadium and the CBD, and as such, the contribution of patron spend on local services is expected to grow consistently.

The increased frequency and scale of events to be held at the redeveloped stadium is expected to improve the levels of visitation and tourism expenditure within the local area and in turn, increase demand for pre and post event entertainment, food and accommodation. This increased demand is anticipated to improve the economic conditions of existing businesses and attract new businesses to the area in the core industries that typically employ a younger workforce i.e. Accommodation and Food Services, Retail Trade and Arts and Recreation Services.

Further, operation of the light rail will enable visitors to the stadium to quickly and easily access entertainment, food and accommodation businesses within Moore Park, Surry Hill and Paddington. Overtime, these areas are likely to experience an increased number of hotel, cafes and restaurants, take away food services, catering services and pubs. As these new businesses will require access to a young labour force within the local area the stadium redevelopment will help secure employment opportunities for the high portion of young adults living within the local area in the future.

An important aspect of the expenditure profile is that there will be less volatility in event expenditure. This expectation relates to the all-weather coverage of the proposed development, which will mean that more people will attend despite the prospect of rain.

A further feature in the local spend profile is that the light rail service will replace buses as a mode of transport between Central Station and Moore Park. Buses currently travel directly to the stadium and do not allow patrons to stop at services along the way. Light rail will allow patrons to 'hop on and hop off' at Devonshire Street, with close access to Crown street. Consequently, there is expected to be more patrons using food and beverage services in Surry Hills as a result of the light rail service. A similar argument applies to the CBD and at other light rail stops.

Table 13 – Annual increase in employment in stadium precinct locality for Food & Beverage Services

Metric	Value
Increase in household spend p.a.	\$6,000,000
Labour value added per \$1	60%
Total labour value increase	\$3,600,000
Additional hours	180,000
Additional hours per week	3,462
Part time and casual jobs @ 10 hours per week	346

Source: ABS, 2015, *Ethos Urban*

8.2.5 Benefits of high quality premium and corporate facilities – interstate tourism

The prospect of greater infrastructure and interstate visitation to Sydney is an important part of the impact analysis. These visitors draw spend into NSW and can help to offset the potential decrease in overseas visitor numbers over the long term.

The rationale for interstate visitor choices has some common features with local residents. The lack of all weather seating is a risk factor in the decision to attend a match. This risk profile is amplified for interstate visitors because these people face the necessary costs of travel (flights) and in some cases accommodation (albeit many stay with family and friends). These costs make the risk of rain impact on seating a substantial factor for interstate patrons. With 100% dripline seating, patrons can be confident that their investment in attendance will not be impacted by rain.

As a separate factor, the quality of stadium facilities has been found to be poor and interstate visitors face a set of event choices that extend to their place of residence. For Melbourne residents in particular, AAMI Park and Etihad/Dockland stadium provide modern and more extensive facilities as points of sale, toilets and other basic elements. For some patrons, these factors are critical to amenity and Sydney is losing visitation as a result. A new stadium will help to entice more sports tourism for these reasons.

Over the past twenty years, tourism for sports purposes was marked by a growing acknowledgment of the inherent relationship between sport and tourism (Gibson, 2003). A substantial amount of sporting activity is characterized by travel (Hinch & Higham, 2001) and the opposite also happens.

A stadium feature that is becoming important for clubs is the VIP corporate segment, which is essential to optimising the value from investment in sports tourism. However, this facet of business embedded in stadium structure was not self-evident during the 1980s, when the SFS was designed and constructed.

The experience in the United States shows that the evolution of premium corporate facilities first emerged in the late 1980s. Following the opening and success of NFL's Miami Dolphins' Sun Life Stadium in 1987 and the NBA's Detroit Pistons' the Palace at Auburn Hills in 1989, the first two venues that incorporated large numbers of luxury suites and club seats, other owners began to realise how such premium seating could be utilised as a source of funds.

Owners saw these two venues generated large revenues from the sale of yearly rights to suites and clubs seats that would be purchased in large part by corporations to entertain clients, often based around national corporate functions that draw interstate visitors. It was these premium ticket seating options that could make the most marginal impact on profit, not the average fan.

A relevant example in Australia is the redevelopment of the grandstand at the Adelaide Oval Stadium. This redevelopment added substantially to the premium seating and corporate facilities at this stadium. Notably, the new Western Grandstand (16,000 seats) is available only for membership holders (both of lead clubs and on reciprocal rights for members of other clubs). There was also substantial premium seating and corporate boxes delivered through redevelopment.

Adelaide Oval was established as a cricket ground in 1872 and started hosting football games in 1877. Over the Oval's long history, it has held many sporting and other events of a wide diversity of types. The historic oval was given a modern upgrade, with a \$535 million redevelopment the oval undertaken. The redevelopment was completed in 2014, and consisted of:

- Demolition of existing stands;
- Construction of new southern and eastern stands, with seated capacities of 14,000 and 19,000 respectively;
- Minor renovations to the western stand; and
- Retention of the heritage-listed scoreboard, grassed northern mound, and Moreton Bay fig trees

Today, Adelaide Oval has a seating capacity of 53,500, as well as 23 function rooms, corporate suites, The Bradman Collection, a museum containing many of Sir Donald Bradman's personal cricket memorabilia, and numerous food and beverage outlets, including the Hill of Grace Restaurant.

The redevelopment of Adelaide Oval has brought substantial benefits for the Adelaide and South Australian economies, as noted in the article cited below:

"The Adelaide Oval effect is shown in separate data prepared by consultants STR Global, which reveals that since AFL matches moved to the CBD from Football Park, attendances are up 44 per cent, accommodation revenue is up 36 per cent and room nights are up 25 per cent." (Adelaidenow, 2017)

The following charts illustrate the clear contribution of the Adelaide redevelopment on sports tourism into Adelaide. With the new facility commencing operations in 2014, there was an initial regain of visitors lost during 2012 and 2013 (when the Adelaide Oval was being redeveloped). Subsequently interstate visitor numbers have trended higher during the 2015 to 2017 years.

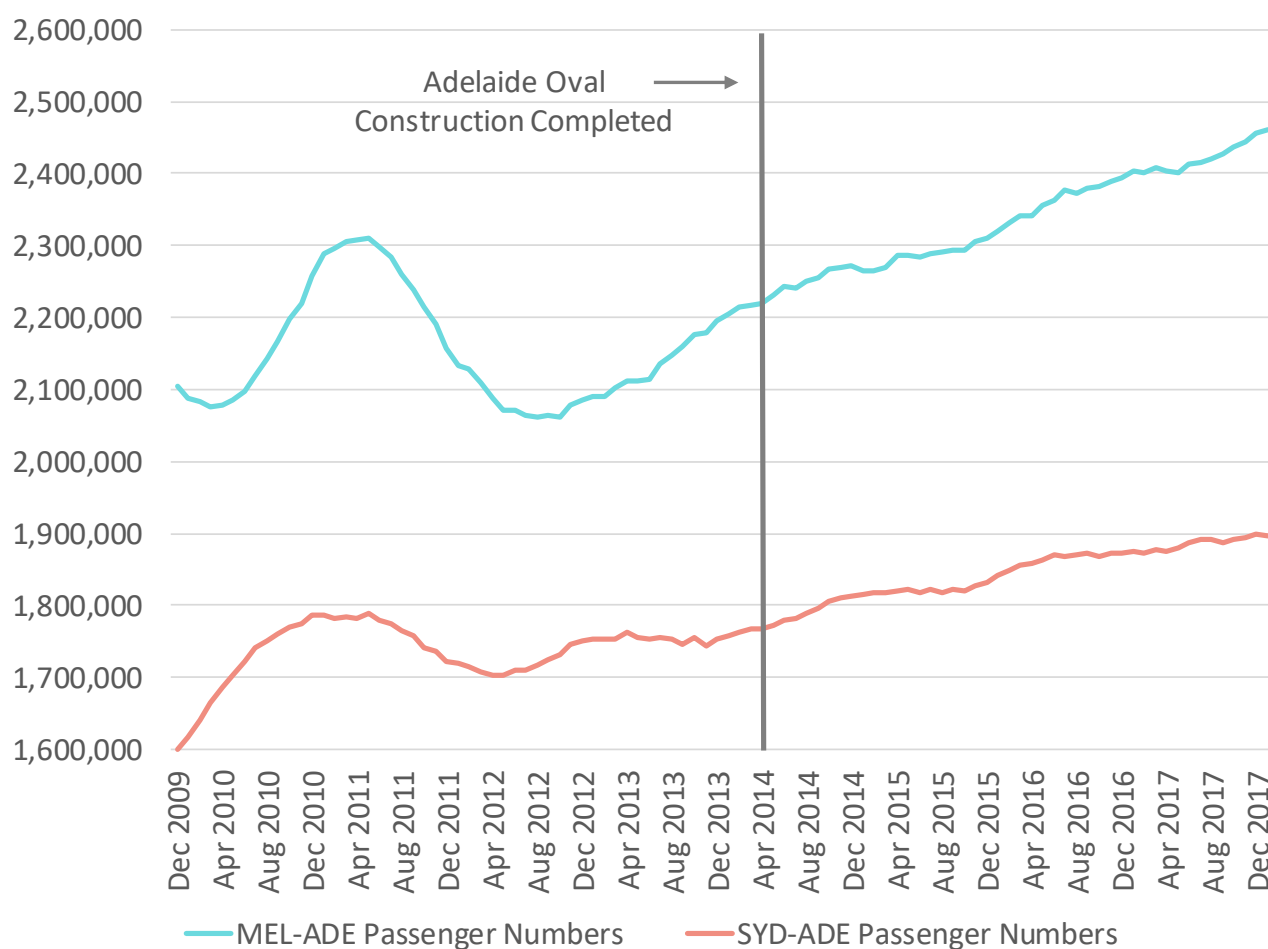


Figure 20 – Flight Route Annual Passenger Numbers (moving annual total persons)

Source: BITRE, 2018.

The contribution of interstate visitor numbers has been evident in demand for hotel accommodations as shown in the chart below. Room nights occupied for the Adelaide SA2 region (which encompasses Adelaide CBD) jumped higher in 2014 and then trended higher in 2015 and 2016 (the most recent data point from the ABS). The June quarter 2016 total was 3.75% higher than the number of the previous corresponding period.

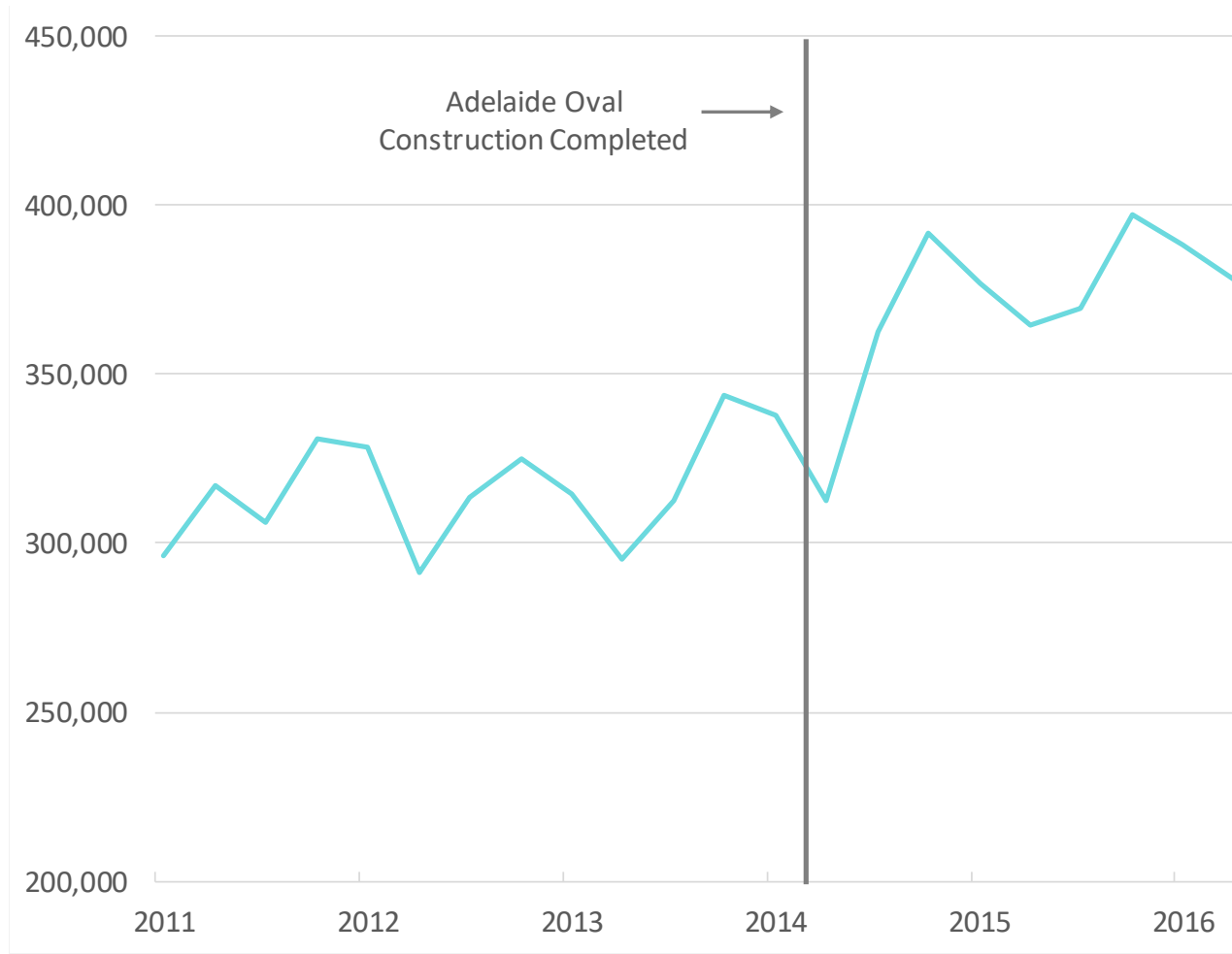


Figure 21 – Room Nights (Occupied) Adelaide SA2 Region, quarterly total

Source: ABS, 2016b

The evidence from Adelaide's interstate tourism boom shows a correspondence with redevelopment of the Adelaide Oval. Three years of evidence is sufficient to draw a conclusion on this aspect of impacts. For the projected SFS, it is expected that of the additional 250,000 visitors from redeveloped stadium (versus the base case) that 75,000 visitors come from intrastate and interstate. Some will stay with family and friends, so the flow through into hotel nights per annum is expected to be substantial.

8.3 Summary of impacts and mitigation measures

The project will generate a number of economic benefits that will support and enhance Sydney's economy, in particular the locality of the stadium. Outlined below is a summary of the key economic benefits generated by the redeveloped stadium.

- During construction, there will be considerable direct employment generated. In turn, local businesses will benefit from a 3-year phase of many workers travelling to and from Central Station, generating local expenditure during off-peak periods.
- No extra car parks are being constructed. Attendance will be led by walking or light rail travel through the locality, creating a funnel effect for local businesses.
- Rain provides a major risk factor for local businesses, leading to volatility in attendance. Coverage to 100% of the drip line will reduce attendance volatility and allow for more stability in worker hours.

- Once the new stadium is built, business gains will be drawn from a greater number of events, providing more consistent income flow and higher numbers of hours worked within and beyond the stadium precinct.
- Businesses are more likely to commit to permanent part-time jobs, as opposed to casual work which creates difficulties in terms of youth underemployment.
- Intrastate and interstate visitor numbers are expected to be stimulated by the greatly improved stadium amenity. Redevelopment of the Adelaide Oval provides a clear exemplar benchmark for incorporating a stimulus effect from sports tourism for the Sydney economy.

A summary of impacts and recommended mitigation measures follows is provided below.

Table 14 – Summary of findings – economic impacts

Comment	Impact
<p>Expenditure and employment impacts (demolition and construction)</p> <p>The initial economic impacts generated by the project will occur during the demolition and construction phase, which is expected to span three years.</p> <p>The development cost of \$593 million will consist of construction spending and ancillary development costs. This level of economic activity is estimated to support close to 600 FTE jobs per annum over the three-year period.</p>	Positive
<p>Supporting local businesses (demolition and construction)</p>	Positive
<p>Employment impacts (direct - stadium operation)</p> <p>Our projections show an increase in attendance would raise the number of total working hours by 15%. This increase would be equivalent to 300 FTE jobs.</p> <p>The new stadium is expected to have a seating capacity. Consequently, it is likely that some forms of stadium employment will increase significantly.</p>	Positive
<p>Expenditure impacts (indirect – local businesses)</p> <p>The frequency and scale of events to be held at the redeveloped stadium is expected to greatly improve the levels of visitation and tourism expenditure within the local area and to, in turn, increase demand for pre and post event entertainment, food and accommodation and generate more employment for residents in the locality.</p> <p>This would also have indirect impact of supporting the night-time economy.</p>	Positive
<p>Recommended mitigation measures: none required</p>	

Appendix A. Community Profiles Data

8.4 Community Profile Source Data

Table 15 – Demographics: Usual Residence Statistics

	PSA	SSA	TSA
Demographics (2016)			
Population	59,007	315,557	4,823,453
% of population aged 19 years and younger	9.81 %	13.73 %	24.64 %
% of population aged between 20 to 34	46.71 %	40.96 %	23.12 %
% of population aged between 34 to 49	22.5 %	22.42 %	21.10 %
% of population aged between 50 to 64	12.38 %	13.49 %	17.2 %
% of population aged between 65 to 79	6.7 %	7.11 %	10.17 %
% of population aged 80 and over	1.91 %	2.28 %	3.76 %
Median age	32	33	36
Cultural Diversity (2016)			
% of residents born in Australia	34.87 %	44.60 %	57.06 %
% of residents who speak English well or very well	31.36 %	29.57 %	29.28 %
% of population living at the same address as one year ago	58.62 %	62.85 %	76.61 %
% of population living at the same address as five years ago	27.69 %	34.33 %	53.22 %
% of residents overseas one year ago	8.69 %	6.4 %	2.48 %
% of residents overseas five years ago	27.28 %	19.86 %	8.85 %
Ancestry (2016)			
Ancestry with the highest proportion	Chinese (19.57 %)	English (18.04 %)	English (19.43 %)
Ancestry with the second highest proportion	English (12.27 %)	Australian (13.21 %)	Australian (18.06 %)
Ancestry with the third highest proportion	Australian (8.41 %)	Chinese (11.21 %)	Chinese (7.77 %)
Ancestry with the fourth highest proportion	Thai (6.19 %)	Not stated (8.39 %)	Irish (6.64 %)
Ancestry with the fifth highest proportion	Irish (4.40%)	Irish (8.15 %)	Scottish (4.90 %)
Families (2016)			
Number of occupied dwellings	22,631	124,674	1,623,874
%People in family households	49.28 %	52.61 %	73.63 %

	PSA	SSA	TSA
%People in group households	15.94 %	13.94 %	4.73 %
%People as lone persons	34.77 %	33.45 %	21.64 %
Dwellings (2016)			
% as detached houses	1.06 %	9.53 %	52.51 %
% as semidetached houses	21.23 %	19.09 %	12.91 %
% as flats, units or apartments	61.47 %	59.46 %	25.92 %
% of dwellings owned outright	17.74 %	16.77 %	29.11 %
% of dwellings being purchased	18.61 %	22.62 %	33.25 %
% of dwellings being rented	59.58 %	56.77 %	34.07 %
Average house loan repayment (\$/month)	2,182.46	2,110.94	2,009.27
Average household rent (\$/week)	629.63	540.69	462.28
Average no. of persons per household	1.87	1.97	2.57
Average household income (\$/week)	2,461.77	2,171.12	2,074.85
Education (2016)			
% of residents with a bachelor's degree or above	44.96 %	40.88 %	28.32 %
% of residents with diploma or advanced diploma	9.56 %	8.57 %	9.33 %
% of residents with certificate III & IV	4.5 %	6.96 %	12.05 %
Residents - Employment (2016)			
Employed	34,309	174,468	2,272,727
% employed in white collar occupations	81.35 %	81.36 %	73.21 %
% employed in blue collar occupations	16.54 %	16.85 %	24.84 %
Residents - Industry of Employment (2016)			
% of agriculture, forestry and fishing workers	0.19 %	0.17 %	0.44 %
% of mining workers	0.22 %	0.15 %	0.21 %
% of manufacturing workers	2.47 %	2.94 %	5.76 %
% of electricity, gas, water and waste services workers	0.4 %	0.49 %	0.78 %
% of construction workers	2.99 %	4.45 %	8.2 %
% of wholesale trade workers	2.22 %	2.5 %	3.58 %
% of retail trade workers	7.01 %	7.53 %	9.32 %
% of accommodation and food services workers	16.86 %	10.64 %	6.68 %
% of transport, postal and warehousing workers	2.38 %	3.91 %	5.04 %

	PSA	SSA	TSA
% of information, media, and telecommunications workers	4.34 %	4.79 %	2.79 %
% of financial and insurance services workers	9.89 %	7.82 %	6.37 %
% of rental, hiring, and real estate services workers	2.27 %	1.99 %	1.94 %
% of professional, scientific, and technical services workers	16.79 %	14.85 %	9.84 %
% of administrative and support services workers	4.87 %	4.15 %	3.58 %
% of public administration and safety workers	3.87 %	6.17 %	5.48 %
% of education and training workers	5.28 %	8.15 %	8.04 %
% of health care and social assistance workers	8.02 %	8.95 %	11.59 %
% of arts and recreation services workers	2.48 %	2.86 %	1.67 %
% other services	2.38 %	3.02 %	3.56 %
Working Population - Employment			
Employed	360,092	578,345	2,209,296
% employed in white collar occupations	88.77%	83.15%	74.81%
% employed in blue collar occupations	9.15%	14.82%	23.26%
Working Population- Industry of Employment (2016)			
% of agriculture, forestry and fishing workers	0.09%	0.10%	0.41%
% of mining workers	0.27%	0.18%	0.23%
% of manufacturing workers	0.82%	2.46%	5.93%
% of electricity, gas, water and waste services workers	0.59%	0.57%	0.80%
% of construction workers	3.17%	3.92%	6.89%
% of wholesale trade workers	0.84%	2.17%	3.71%
% of retail trade workers	4.79%	6.08%	9.53%
% of accommodation and food services workers	7.05%	7.08%	6.81%
% of transport, postal and warehousing workers	2.0%	6.65%	4.99%
% of information, media, and telecommunications workers	4.65%	4.85%	2.84%
% of financial and insurance services workers	23.96%	15.49%	6.60%
% of rental, hiring, and real estate services workers	2.78%	2.37%	1.99%
% of professional, scientific, and technical services workers	22.41%	17.29%	10.09%

	PSA	SSA	TSA
% of administrative and support services workers	4.76%	4.18%	3.30%
% of public administration and safety workers	7.92%	7.11%	5.69%
% of education and training workers	3.44%	5.41%	8.20%
% of health care and social assistance workers	2.95%	5.26%	11.71%
% of arts and recreation services workers	1.83%	2.16%	1.66%
% other services	1.88%	2.43%	3.53%

Source: ABS, 2016; Ethos Urban